



MCSD Training Manual

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INTRODUCTION

This manual is based on an interactive model of educational program planning focused on MCSD's staff and organizational needs. Processes are not all linear; in many instances it is suggested that a number of components and tasks should be undertaken simultaneously and not necessarily in any standard order.

The model consists of eleven components, and each component includes a set of tasks and decision points. Not all of the components or tasks need to be addressed in developing every program.

The purpose of the MCSD training department is threefold:

- To prepare MCSD staff and managers to enter the organization, improve their present job performance, or advance and/or change their chosen occupation.
- To assist MCSD in adapting to a changing marketplace, products, and ways of operating.
- To assist MCSD staff and managers in responding and coping with professional challenges.

The staff of this department are responsible for four primary functions:

- To coordinate all existing educational activities within MCSD.
- To develop and manage all educational activities for supervisory and administrative personnel.
- To serve as consultants to senior management on issues related to organizational change and development.
- To provide educational programs that address the professional development needs of individual employees.

Educational programs foster three kinds of change:

- Individual change related to the acquisition of new knowledge and building of skills;
- Organizational change resulting in new or revised policies, procedures, and ways of working; and
- Marketplace change that allows for differing segments of the Egyptian financial community to respond and function in alternative ways.

TASK I

Establishing a Basis for the Planning Process

1.1 Objectives

- To become knowledgeable about the internal and external contextual factors for planning, including MCSD's structural aspects and staff.
- To build and maintain structural supports of planning (mission statements, standard operating procedures, standard operating policies and procedures, information systems, and financial resources).
- To ensure support from program participants, organizational staff, and external constituencies through such mechanisms as active participation in planning and conducting educational activities, transfer-of-learning strategies, and formal and ad hoc committee work.
- To provide a supportive organizational culture in which continuous learning and change are valued.

1.2 Two major elements are important in identifying and establishing a basis for program development

- Clarifying the context for planning
- Establishing a solid base of support for educational activities

1.2.1 Context

Clarifying context requires an analysis of both internal and external institutional and environmental factors.

1.2.1.1 Internal contextual factors can be characterized under three headings:

- A. *Structural factors* include the mission, goals, and objectives of MCSD's standard operating policies and procedures; the system of formal organizational authority; information systems, decision-making patterns; financial resources; and physical facilities.
- B. *People factors* include MCSD program planning staff, program participants, top-level management, and administrative personnel; supervisory personnel, program "stakeholders," and boards of directors.
- C. *Cultural factors* include the history and traditions of the MCSD, organizational beliefs, and values.

1.2.1.2 External contextual factors involve the wider community and include interactions among MCSD and the Egyptian and international financial communities. Of particular concern to educators and trainers are the

following:

- A. *Relationships with organizations and groups* that have major influence and/or control (including regulatory and/or fund responsibilities) over the programs being planned (for example, professional associations, regulatory bodies, and governmental and quasi-governmental agencies).
- B. The *nature of interaction* (for example, competitive or cooperative) between and among MCSD and other providers of similar educational and training programs.
- C. *How MCSD training department is perceived* by potential program participants who are not members of the sponsoring group (that is the issues of credibility, applicability).
- D. *The general economic, political, and social climate.*

1.2.1.3 There are four basic sources for contextual information:

- A. Written documents (e.g. annual reports, organizational descriptive material, policies and procedures manuals, strategic planning reports, newspapers, and government documents).
- B. People (e.g. colleagues, supervisors, key managers, program planners from other organizations, professional networks).
- C. Formal group sessions (e.g. such as boards and committees, and work teams).
- D. Electronic databases.

1.2.2 Establishing a solid base of support for educational activities

It is important to establish a firm base of support for planning and conducting educational programs. *This support should take the form of both commitment and action.* Commitment is viewed as a recurrent promise, which usually comes in the form of written and/or verbal statement from upper management.

Providing meaningful and useful programs best produces support from *participants*. Most participants will support the program if it is well presented and helpful to them.

An essential strategy for building participant support is to *actively involve participants to assist in planning and conducting the program.*

1.2.2.1 Involve participants/learners before the program:

- Ask participants what they want to learn and how they prefer to learn.
- Invite selected participants to assist in planning the program.
- Ask participants who have been involved in previous programs to help recruit new participants.

1.2.2.2 Involve participants/learners during the program:

- Invite participants to serve as instructors and/or resource persons.
- At specified intervals, ask participants how they feel the sessions are going and make changes, as appropriate, based on their suggestions.
- Pair experienced practitioners with novices, asking them to serve as helpers in the learning process.

1.2.2.3 Involve participants after the program:

- Encourage participants to serve as peer coaches to each other in applying what they have learned.
- Ask selected participants to assist in collecting and reviewing evaluation data.
- Invite previous participants to serve as mentors, helping participants apply what they have learned.

Support from the immediate supervisors of participants is crucial at all points in the educational cycle.

1.2.2.4 Involve Supervisors before the program:

- Invite supervisors to assist in the assessment of the learning needs of staff, including asking staff what they perceive their needs to be.
- Encourage supervisors to assist in scheduling educational activities and choosing staff for these activities.
- Invite supervisors to work with participants to help them prepare for the upcoming session with a focus on how the material can be integrated back into what they do.
- Ask supervisors to assist in collecting baseline evaluation data.

1.2.2.5 Involve supervisors during the program:

- Invite supervisors to attend parts of the program that would be helpful to them in carrying out their supervisory responsibilities.
- Ask supervisors to avoid calling participants out of sessions to handle work-related problems.
- Encourage supervisors to serve as instructors or resource persons for specific programs.
- Urge supervisors to help participants make connections between what they are learning in the program and what they actually do on the job.
- Ask supervisors to provide informal feedback on how the program is being received by staff.

1.2.2.6 Involve supervisors after the program:

- Ask supervisors to provide feedback to the planning staff and instructors on whether programs are addressing adequately the needs that were identified.
- Urge supervisors to provide time for participants to share their learning with fellow staff and encourage participants to serve as peer coaches to each other in applying what they have learned.
- Request that supervisors work with participants to assist them in integrating the knowledge and skills learned in actual work activities.
- Ask supervisors to assist in collecting data for evaluation and follow-up.

1.2.2.7 Support from senior management is also essential and can be gained in the following ways:

- Do a great job! Set specific goals and objectives for the educational activities, in an easily understood form and meet them. Provide documentation in a clear form of the successful results and benefits of the program.
- Demonstrate that you thoroughly understand the MCSD including its mission, goals, products and services.
- Request that senior management issue formal policy and procedural statements concerning the educational activities of the organization.
- Ask managers and administrators to become actively involved in the design and evaluation of important programs.

1.2.2.8 The use of committees can be a helpful to build both internal and external support for educational programs. A formally constituted education committee may be permanent or temporary, structured for a specific training objective. Committees can make a very positive contribution if utilized in the follow ways:

- Committee members should clearly understand what they are supposed to do and what the parameters are for making decisions and taking actions.
- Committee members should have a working knowledge of the program.
- Staff should ensure that committee members have real tasks to do and that they are responsible for decisions that are still in the idea stage; they should not be asked merely to rubber-stamp decisions already made by others.
- Committee meetings should be well planned. Operating norms and procedures for meetings should be clear and either applied consistently or modified if they are not working.
- Individual and group tasks accepted by committee members should be clear, specific, and definitive. A tracking system should be used to ensure that all assignments are carried out in a timely manner.

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- Committee members should be kept informed about how their decisions and actions have been incorporated into the work of the sponsoring unit or organization.

TASK TWO

Identifying Program Ideas

2.1 Objectives

- Decide what sources to use in generating ideas for educational programs.
- Determine the best way or ways to identify these ideas (for example formal needs assessments, observations, interviews, conversations with colleagues, job analysis, and review of written materials).

2.2 Sources of Ideas for Educational Programs

Ideas for educational programs surface in a number of ways, from identified needs to specific problems and opportunities. These ideas stem from three primary sources—people, organizations, and the Egyptian and international communities. Examples of specific sources are highlighted on the following chart:

Chart I

Sources of Ideas for Educational Programs

SOURCES	SPECIFIC EXAMPLES
People	<ul style="list-style-type: none">■ Potential participants■ Educators, staff developers, and trainers in other organizations■ Colleagues■ Content experts, consultants■ Managers■ Marketplace stakeholders■ Customers
Organizations	<ul style="list-style-type: none">■ Changes in the MCSD or other related organizations' missions statement■ Changes in marketplace policies, procedures, and/or structures■ New products or services■ Identified problems■ Government regulations■ Legislative mandates■ Recommendations from professional associations
Marketplace	<ul style="list-style-type: none">■ Identified problems within Egyptian marketplace■ International marketplace issues and problems■ Political climate/changes■ Technological innovations

Eight effective methods for generating ideas for educational programs are outlined below along with a list of basic operational guidelines:

Chart II

Methods for Generating Educational Program Ideas.

Observations	Watching people perform actual or simulated tasks and activities. Individuals and/or groups of people can be observed.	<ul style="list-style-type: none">■ Observations may be open-ended or structured with specific variables to investigate.■ Examples of specific types of observations include time-motion studies, task listings, behavioral frequency counts, and the recording of critical activities or events.
Written questionnaires/surveys	Gathering opinions, attitudes, preferences, and perceptions by means of written questionnaires.	<ul style="list-style-type: none">■ Pretest and revise the questions and format as needed.■ Employ a variety of question formats including open-ended, ranking, checklists, and forced choice.■ Administered to individuals or groups.
Interviews	Conversing with people individually or in groups, either in person or by phone.	<ul style="list-style-type: none">■ Select appropriate interviews that are either open-ended, nondirected or formally structured with specific questions.■ Pretest and review interview questions as needed.
Group sessions	Identifying and analyzing ideas, problems, and issues in group sessions.	<ul style="list-style-type: none">■ Select an idea, problem, or issue of concern to the group.■ Employ group facilitating techniques (brainstorming, nominal group techniques, focus groups, consensus ranking).■ Provide competent leadership and select group members who are both knowledgeable and willing to participate.

Methods for Generating Educational Program Ideas (continued)

Job and task analysis	Collecting, (tabulating) grouping, analyzing, interpreting, and reporting on the duties, tasks, and activities that make up a job. Tasks may be cognitive and/or motor (action) in nature.	<ul style="list-style-type: none"> ■ Be sure the analysis is of a current job and performance. ■ Provide for data collection from all knowledgeable parties (job incumbents, supervisors, managerial personnel, volunteers, and/or clients/customers). ■ Use a variety of techniques to collect data such as questionnaires, task checklists, individual and group interviews, observations, a jury of experts, work records and analysis of relevant technical publications.
Written and performance tests	Employ paper-and-pencil tests, performance exercises and/or computer-based items to measure a person's knowledge, skill, and/or attitudes/values.	<ul style="list-style-type: none"> ■ Determine what the test measures (knowledge skills, attitudes, values) and use it as a diagnostic tool for that. ■ Be sure that what the test measures is relevant and important to the particular situation in which it will be used (do not use a test for knowledge if you are interested in a hands-on skill). ■ Check to see if the test is both reliable and valid.
Written materials	Gleaning information from a variety of written including strategic planning reports, policies and procedures manuals, performance evaluations, minutes of meetings, employee records, job efficiency indexes, monthly and annual reports, research and evaluation studies, curriculum reviews, statements of professional standards and competencies, books, professional and trade journals, legislation, and contents of file drawers.	<ul style="list-style-type: none"> ■ Maintain an up-to-date, active file of written materials that pertain to your educational activities. ■ Use the materials as sources of information in conjunction with other methods.

2.3 Methods for Generating Program Ideas

Each method for generating program ideas has its own strengths and weaknesses, depending on the situation and the data required. *The following six criteria are helpful when selecting methods:*

1. Level of involvement wanted by current or potential program participants.
2. Level of involvement wanted by other people, groups, and/or organizations.
3. Time requirements for gathering information.
4. Cost of using the method
5. Type and depth of data required
6. Ability of planning staff to use the method

Observations, for example, normally require a low level of involvement by current or potential participants, while interviews and group sessions require a higher level of involvement. Costs and time requirements for written questionnaires and job analyses are usually high; in contrast, costs and time requirements for conversations with colleagues and friends and for reviewing written materials are generally low or moderate.

2.4 Conducting a Formal Needs Assessment

Although conducting a formal needs assessment is not always the best way by which ideas are identified for educational programs, it is a process that can be extremely effective in appropriate situations. A formal needs assessment is defined as a systematic way to identify educational gaps or problems. The focus of the assessment is not on solutions for specific problems but on clarifying and defining the problems.

There is no one accepted process for conducting a formal needs assessment. Rather, a number of models or descriptions of procedures have been developed. A nine-step revised needs assessment model, incorporating many features of other descriptions, follows, along with specific examples of how to carry out each step for an organization-wide needs assessment.

CHART III

Needs Assessment Model

1. Make a conscious decision to complete a needs assessment with a commitment to planning.	MCSD administrators issue a formal request to the training department to conduct a needs assessment.
2. Identify individuals to be involved in planning and overseeing the needs assessment.	A task force of six people is appointed, composed of managers from various MCSD departments.
3. Develop focus and specific objectives for the needs assessment to ensure that it answers critical questions.	The task force determines to focus the needs assessment on the following questions: (1) What major skills, values, attitudes, and knowledge do midlevel MCSD managers need to perform effectively and efficiently in their present positions? (2) In two years, how might this list of needs change, based on future forecasts and trends?
4. Determine the time frame, budget, and staff.	<ul style="list-style-type: none">■The task force determines that the needs assessment will be completed in six months.■Project assignments and budget assignments are approved.
5. Select data collection methods.	The methods chosen for data collection include a written survey, key informant interviews, group meetings, and a review of written materials and documents.

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Needs Assessment Model (continued)

6. Collect data.	<ul style="list-style-type: none">■The survey is developed in consultation with the task force and administered by training staff.■Training department staff conduct the group sessions with midlevel managers and their subordinates to review all written materials.■The task force conducts the key informant interviews with twelve people: two top managers, six midlevel managers, three subordinates of these managers, and one outside consultant.
7. Analyze data to determine (a) the basic findings in terms of quantitative and qualitative descriptions, (b) points of agreement and disagreement, and (c) agreed-upon findings concerning identified needs.	<ul style="list-style-type: none">■An analysis of the data that includes an in-depth description of each major need area (what presently exists vs. what is required) is completed by the Training staff.■The task force reviews and critiques this analysis and makes required modifications.
8. Sort and prioritize each of the identified needs and indicate (a) which needs should be responded to first, second, and so on, and (b) needs for which alternative interventions are more appropriate.	Applying a priority rating instrument, the task force determines what needs should receive priority rankings.
9. Report the results of the needs assessment to appropriate individuals and groups within the MCSD.	<ul style="list-style-type: none">■A full report of the needs assessment process, findings, and conclusions is submitted to the MCSD administration.■Once approved, an executive summary is given to all midlevel managers.■Task force members meet with key individuals from senior and midlevel management to discuss preliminary ideas for management development programs.

One of the most important outcomes of a formal needs assessment is a commitment by those involved in the process to ensure that the ideas from the needs assessment are actually used in the program planning process. This means making sure at the outset that those who have the authority to implement the findings of such assessments are willing to listen to the voices of those who respond and that they will actually implement programs based on those findings. One helpful way to let respondents know that they have been heard is to inform them (through newsletters, bulletin boards, meetings, and the like) how the results have been translated into upcoming programs.

TASK THREE

Sorting and Prioritizing Program Ideas

3.1 Objectives

- Determine whether an educational program, one or more alternative interventions, or a combination of both is the best way to respond to the ideas generated.
- Develop a process for prioritizing those ideas for which educational programs should be planned. The critical ingredient is this process is the establishment of clear criteria for making decisions about each of the ideas.
- Become knowledgeable about alternative interventions and create networks of people who will listen and act when these alternative interventions are needed.

3.2 Sorting and Analyzing Ideas

Planning educational activities is not the only, or necessarily the best, way to respond to various ideas, problems, and opportunities that have been identified. Therefore, program planners need to make decisions about whether alternative interventions—options other than educational and training activities—might be a more useful response.

As with other planning tasks, asking for assistance with this sorting process is usually a good idea, especially when large numbers of ideas have been generated from diverse sources. This assistance could come from colleagues, education committee members, other groups internal to MCSD, external parties, and/or a combination of the above.

Three major factors, alone or in combination, can be used to make judgments about whether an educational program should be developed based on an identified idea or problem: people, environmental conditions, and cost.

The *people factor* centers on the knowledge and skills of individuals and groups. Is the content being proposed something people already know or can do but either choose not to demonstrate or are blocked from demonstrating by other people?

The *environmental factor* focuses on conditions external to the person. Types of environmental or situational conditions that may need to be altered in lieu of offering an educational program include communication systems, personnel practices, physical environments, organizational norms and expectations, equipment, and the nature of the task or job itself.

The third factor for consideration is the *cost factor*, which includes time, money, and staff. When the costs of a proposed educational program are more than the benefits it provides, it is time to consider other alternatives to get at the same issue or idea. One way to do this is through a cost-benefit analysis.

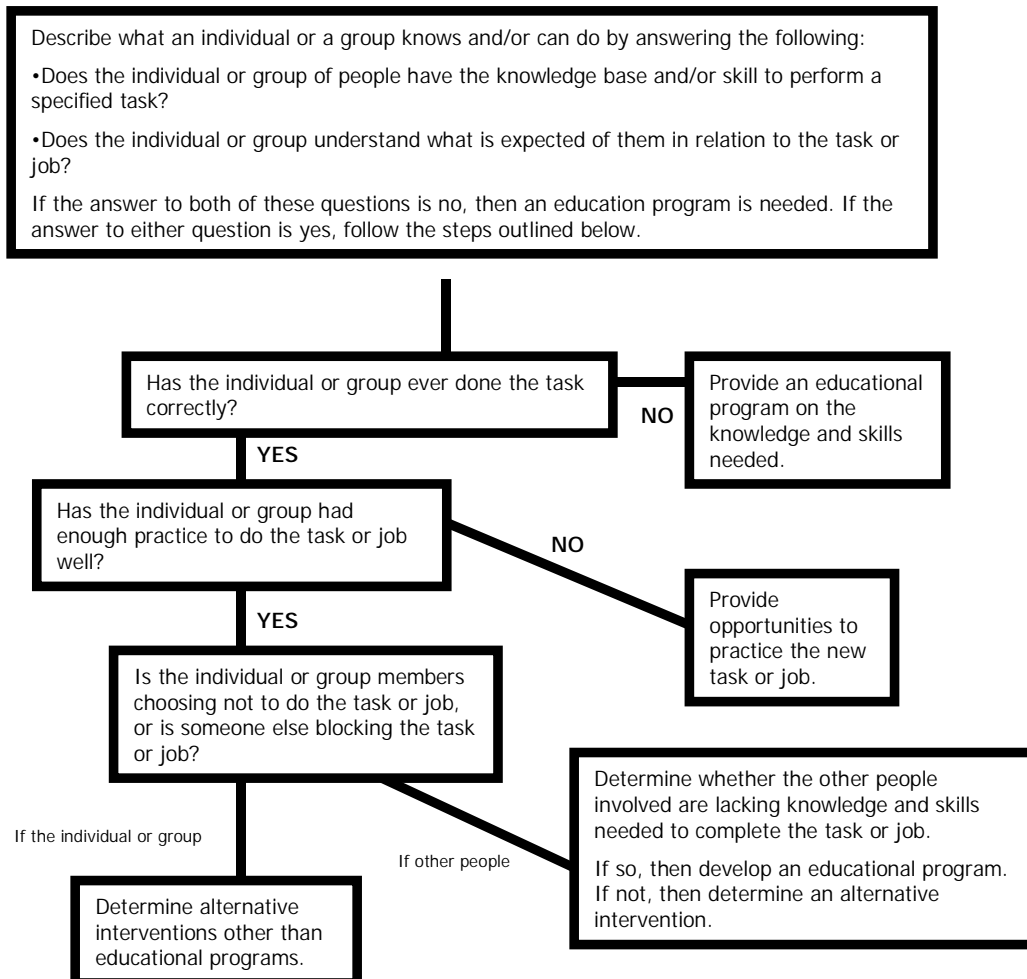
What is done with those ideas that are not included in the educational planning category depends on the role and function of the planning staff. Some personnel involved with program planning are responsible for determining alternative interventions and ensuring that they are used. These people usually have specialized

training in such areas as organizational development, instructional design, or human resource management. More often, though, program planners pass program ideas more appropriate for alternative interventions along to other units or groups, which then decide what should be done.

People who plan educational programs must have good networks of people, know their organization and communities, and have access to sources outside of their immediate environment. In addition, they should have a working knowledge of alternative interventions, because they are often asked to help define more specifically the ideas or problems and what might be done about them.

CHART IV

Making Training Program Decisions Based on What People Know and/or Can Do.



3.3 Determining Priorities for Educational Programming

Depending on the planning context, any combination of the following people may be involved in setting program priorities:

- Current and potential participants
- Staff involved with the educational program
- Supervisors of potential participants
- Key management/administrative personnel
- Education committee members
- People from outside the MCSD (for example, community leaders and/or consultants).

Those responsible for planning programs may consult with these people on an individual basis and/or involve them in group discussions. Group meetings may be of an informal nature, or they may be formally organized committees such as a formally constituted education committee.

The process of how final priorities are set is also tied to the context within which the decisions are being made:

- Do those responsible for planning programs have the authority to make decisions about priorities, or must all such decisions be cleared with someone higher up?
- Are planners expected to use a collaborative style of making decisions?
- Can the planners make decisions within the confines of their own organizations, or must they form decision-making networks with external groups?

3.4 A Systematic Process of Determining Priorities

The following four-step process is designed to help planners systematically determine priorities among identified ideas for programs. The key element is establishing early in the process clear criteria for making decisions about each of the ideas.

*The **first step** in this process is to identify the people who should be involved in setting priorities.* Depending on the situation, a number of different types of people could be involved in setting priorities for educational programs, from potential participants to key administrators or managers to influential community leaders. Included should be those who are in a position to allocate resources and who are interested in employing a systematic procedure for determining priorities.

*The **second step**—selecting or developing appropriate criteria—is the key element in determining priorities.* These criteria provide not only the basis upon which priorities are judged, but also serve as the justification for the eventual choices. No one criterion or set of criteria fits all situations and there are no formulas or guidelines for selecting criteria.

Two different criteria systems based on specified categories follow:

Criteria Set #1

- Critical (must be resolved in the next six months)
- Very important (must be resolved in the next year)
- Important (should be resolved within two years)
- Minimal (should be dealt with, but only if enough time and resources are left over from higher-priority needs)
- Not important (not necessary to deal with)

Criteria Set #2

- Highest 5 percent of all ideas
- Highest 20 percent of all ideas
- Middle 50 percent of all ideas
- Lowest 20 percent of all ideas
- Lowest 5 percent of all ideas

Another approach is to rate program ideas either only on their relative importance, or their relative feasibility, or on both importance and feasibility. The following chart includes specific criteria for each category:

Chart V

Process for Determining Priorities

Importance Criteria	Description
<i>Number of people affected</i>	An estimate of how many people would be involved if a specific idea were addressed.
<i>Contribution to goals</i>	The degree to which addressing the idea will contribute to the attainment of MSCSD organizational goals.
<i>Immediacy</i>	The degree to which each program idea requires immediate attention.
<i>Value</i>	The degree to which one idea will have a positive or negative effect on addressing other ideas.
<i>Magnitude of discrepancy</i>	The relative size of the gap between the present condition and target condition.

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Process for Determining Priorities (continued)

Feasibility Criteria	Description
<i>Educational efficacy</i>	The degree to which an educational intervention (program or series of programs) can contribute to addressing the idea, need, or opportunity.
<i>Availability of resources</i>	The degree to which the resources including personnel, money, equipment, and facilities would be available to support the intervention.
<i>Commitment to change</i>	The degree to which those with vested interests (for example, participants, administrators, marketplace groups) are committed to addressing the idea or opportunity.

The **third step** is to record the ideas, along with the criteria, on a priority rating chart. Assign, where appropriate, weighting factors to each criterion. Priority rating charts are especially helpful when priorities are determined by a number of individuals. The charts can be completed individually and then the ratings compiled, or they may be completed by a group as a whole. The size and complexity of the chart depends on how many criteria have been chosen and whether all the criteria should be rated equally or whether some criteria should have greater impact on the decision than others.

As the **fourth step**, apply each criterion to each idea using the priority rating system. Combine individual values to yield a total priority value for each need. When applying criteria that are weighted equally, two alternative systems are suggested.

3.5 Alternative Inventions

Educational and training programs are not always the answer to the ideas and problems identified. This may require a new way of thinking for some—especially for people who work with organizations and groups where using the educational process has always been the norm for solving problems or implementing new ideas. Although few program planners actually have the responsibility for developing and/or initiating these alternative interventions, it is important for staff to know what types of options are available. Having this knowledge can help planners do a better job with the initial sorting process, have a better sense of who they need to talk with about possible alternative interventions, and provide useful observations and suggestions to those who have the responsibility for implementing these different responses. A description of some of the most often used alternative interventions to educational and training programs are outlined on the following chart:

CHART VI

Alternative Interventions

Alternative Intervention	Examples	
<i>Job aids.</i> Mechanisms for storing information that is external to the user and provides guidance, direction, and/or support for doing work tasks and other activities.	<ul style="list-style-type: none"> ■ Checklists ■ Algorithms ■ Procedures manuals ■ Work samples 	<ul style="list-style-type: none"> ■ Fold-out cards ■ Charts ■ Audio- or videotapes ■ Memory joggers
<i>Redefinition of the job or task.</i> Changes in the content, activities, and/or responsibilities of a task or job.	<ul style="list-style-type: none"> ■ Job enrichment ■ Job enlargement 	<ul style="list-style-type: none"> ■ Job rotation ■ Performance standards
<i>Feedback systems.</i> A process for providing information to an individual and/or group about the task/activity being performed.	<ul style="list-style-type: none"> ■ Individual meetings ■ Memorandums ■ Team meetings 	<ul style="list-style-type: none"> ■ Quality circles ■ Customer surveys
<i>Personnel practices.</i> Changes in the way people are recruited, screened, hired, trained, evaluated, and rewarded.	<ul style="list-style-type: none"> ■ Recruitment practice ■ Selection processes ■ Staff training ■ Appraisal/evaluation systems 	<ul style="list-style-type: none"> ■ Job transfer ■ Job termination ■ System of incentives ■ Flexible scheduling
<ul style="list-style-type: none"> ■ <i>Changes in work environment, facilities, and/or tasks.</i> Alterations in the conditions where the job/task is performed and/or the tools used to do the job or task. ■ <i>Action research.</i> Research that has as an end product a main goal of improving practice. 	<ul style="list-style-type: none"> ■ Comfortable environment ■ Good air quality ■ Renovated facilities ■ New equipment 	<ul style="list-style-type: none"> ■ Testing of new techniques or methods ■ Examination of alternative strategies ■ Study of the culture of the organization
<i>Organizational development.</i> A systematically planned change effort for the purpose of developing and implementing action strategies for organizational improvement.	<ul style="list-style-type: none"> ■ Laboratory training ■ Team building ■ Total quality management ■ Third-party facilitation ■ Organizational redesign 	<ul style="list-style-type: none"> ■ Redesign of communication systems ■ Changes in decision-making processes ■ Changes in reporting relationships

Program planners may find it helpful to focus on who or what the Intervention is directed toward, individuals and/or groups, jobs or tasks, and/or units or the entire organization:

3.5.1 Individual/Group Alternatives

- Provide job aids (for example, checklists, charts, manuals, reference aids).
- Encourage regular feedback sessions.
- Host team meetings.
- Change the reward system (for example, allow for individual choice of schedule, provide educational opportunities at no cost to the individual).

3.5.2 Job/Task-Specific Alternatives

- Redefine the job.
- Encourage job rotation.
- Install new equipment.
- Change the environment in which the job is performed.
- Change the performance standards.
- Communicate the performance standards differently.
- Eliminate the job.

3.5.3 Organizational Alternatives

- Improve the personnel system on an organization-wide basis.
- Conduct an action research project on the climate of the organization.
- Use an organizational development process to build trust levels among units in MCSD.
- Change the organizational structure and/or patterns (such as who reports to whom within MCSD).

TASK FOUR

Developing Program Objectives

4.1 Objectives

- Write program objectives that reflect both what participants will learn and the resulting changes from that learning, as well as the operational aspects of the program.
- Ensure that both measurable and nonmeasurable program outcomes, as appropriate, are included as way for revising the objectives once in place.
- Check to see that program objectives are written clearly so that they can be understood by all parties involved.
- Use the program objectives as an internal consistency and "doability" checkpoint (for example, do the transfer of learning and evaluation plans match the objectives).

4.2 Defining Program Objectives

Program objectives provide clear statements of the anticipated results to be achieved through an educational program, and they serve as concrete guidelines for developing transfer-of-learning plans, as benchmarks against which programs are evaluated, and as the foundation for instructional plans. In contrast, program goals usually refer to broad statements of purpose or intent for educational programs. The major program goals should be linked directly to the MCSD organizational mission statement.

Program objectives should focus primarily on what participants are expected to learn as a result of attending a specific educational or training program. This learning may result in changes in individual participants, groups of learners, organizational practices and procedures, and/or communities or segments of society. In addition, program objectives may outline how program staff will improve the quality and quantity of program resources and other basic operational aspects of the program.

4.3 Constructing Program Objectives

Educational programs have some outcomes that are measurable and some that are not. Outcomes can be either intended or unanticipated, because it is almost impossible to know beforehand all the benefits a program could produce. Therefore, in constructing program objectives, it is important to state both measurable and nonmeasurable objectives and to be flexible in reshaping those objectives so that unanticipated but important achievements and outcomes of the program can be highlighted. This notion of measurable and nonmeasurable and intended and unanticipated results is illustrated in these examples of specific program objectives:

4.3.1 Measurable Achievements:

- *Intended achievements (stated before the program is carried out).* To provide an educational program on time management for all new entry-level MCSD staff. As a result of the program, the participants will be able to demonstrate at least

two ways they have restructured their day to save at least one hour of time per week.

- *Unanticipated achievements (stated during the program or after it has been carried out).* About 50 percent of the support staff report that it took them less time now to manage their calendars and monitor their telephone calls.

4.3.2 Nonmeasurable Achievements:

- *Intended achievements.* To assist new MCSD administrators establish priorities and department objectives.
- *Unanticipated achievements.* A number of the new administrators remarked on the evaluation that they felt more confident to carry out their jobs.

4.3.3 Program planners should never develop program objectives in a vacuum. Instead, other people, such as program participants, department supervisors, and external stakeholders, should be asked to help in developing these objectives. This involvement can be handled in a number of ways:

- Training department staff can request that key supervisors of potential participants help draft and/or review program objectives for their people.
- They could also ask a sample of potential participants to help with this same process. Questions and comments from both these groups could be solicited on the relevance and usefulness of the objectives and on their understandability (especially concerning actual practical application and usefulness).
- If a formal education committee exists, this committee could serve as a review board and give advice and counsel in the initial writing and/or the redrafting of the objectives.

4.3.4 The following three properties characterize clearly articulated program objectives:

- Program objectives are essentially rational and thus impose a logical pattern on the educational program.* This does not mean that the objectives do, or even could, describe all the possible outcomes of educational programs over a specified period of time. For example, for large programs, no one set of objectives could be that comprehensive in scope. Nor will these objectives address the usually accepted, but often unstated, motives, aspirations, and objectives of those persons who plan and/or participate in educational activities.
- Good program objectives are practical and concrete.* As practical guides for action, program objectives should neither describe things as they ideally should be nor focus on esoteric problems that have no basis in reality. The ultimate test of an objective is not validity but achievability.
- Good program objectives are discriminative.* By stating one course of action, another is ruled out. For example, if resources for the next calendar year are targeted at new personnel, for the most part all other staff will be excluded from educational activities. Whether this course of action is appropriate depends on a number of factors. For example, was an educational program for new staff seen

as a priority need? Does senior management support this decision? Do the supervisors of the new staff believe the programs being planned meet the needs of their people?

People who plan programs can ask themselves the following questions to help them judge the clarity of the program objectives they have developed:

- Is there a clear relationship between the objective and the ideas, problems, and needs that have been identified as priority areas?
- Does the objective focus on a crucial part of the program? Is the objective practical and doable? Is the objective attainable in the time frame proposed? Does the objective clearly communicate the proposed outcomes or accomplishments?
- Is the objective meaningful and will it be understood by all interested parties?
- Is the objective supposed to be measurable, and if so, is it?

Program objectives often need to be changed or reworked at some point in the life of a program. Practically speaking, this means program planners must be willing to eliminate, revise, and/or add program objectives as the situation warrants. This updating of program objectives should be done in a thoughtful way. Staff should not modify or eliminate certain objectives just because they do not want to do them or because those objectives cannot be met as proposed; rather, staff need to reflect carefully when revising or adding to initially agreed upon program objectives.

4.4 Using Objectives as Checkpoints

Clearly stated program objectives provide one of the major checks for ensuring that a program has internal consistency and is doable. This does not mean these objectives will necessarily be constructed prior to working on or completing planning tasks. However, once these objectives have been developed, other aspects of the plan (for example, the transfer-of-learning activities, budget, and staffing) or the planning process itself can be revisited to see if what is being proposed really addresses the expected outcomes and can be done. The following scenarios illustrate this point.

Scenario I

In planning a continuing education program for bookkeepers on a new on-line settlement system, the MCSD planning team at its third meeting reviews a draft of the program objectives. One of the significant expected outcomes is that participants would be able to integrate the new system as part of their practice within the next six months. Three of the planning team members caution the team that the potential participants are probably at many different stages in integrating basic technology systems into their current practices and question whether this objective is realistic. Based on these observations, team members then decide to reexamine the activities planned for the program itself to determine whether they can develop a transfer-of-learning plan that addresses this issue.

Scenario 2

In reviewing a draft of a revised training program for bookkeepers, the MCSD training manager notices that what has been proposed is probably not doable, given some recently projected funding cuts in the training budget. She decides to ask the training committee that put the plan together to continue to meet and revise the plan in light of these projected budget shortfalls. In discussing with the committee they might go about this task, the training manager suggests that the committee might start with reviewing the program objectives. For example, which of the objectives are more critical than others? Could some of the objectives be achieved in a different way—one that would require less cost? Might some of the objectives be scaled back in terms of the projected outcomes? The chair agrees that this would be a good starting point for revising the whole plan.

Using the program objectives as an internal consistency check can be especially helpful in matching transfer-of-learning and evaluation plans to what people want to see happen. For some programs, the connections between and among the program objectives, the transfer activities, and the evaluation process may be readily apparent—the strategies and techniques for doing the transfer of learning and evaluation may overlap or be one and the same.

For example, using the formal supervisory process may be the chosen strategy to ensure that participants use what they have learned on the job. In turn, the evaluation plan may include interviewing supervisors or staff who take the program as well as reviewing performance appraisal data. Therefore, checking to see that these components of the plan line up with one another and get at proposed outcomes may be relatively easy. In other programs, seeing that these components match may be more difficult. This is especially so, for example, when the sponsoring organizations or groups are not responsible for monitoring or evaluating the transfer-of-learning activities and outcomes.

TASK FIVE

Preparing for the Transfer of Learning

5.1 Objectives

- Decide when the transfer-of-learning strategies should be employed.
- Determine the key players who need to be part of the transfer-of-learning process.
- Choose transfer strategies that will be the most useful in assisting participants to apply what they have learned (for example, developing individualized learning plans, providing mentors or coaches, self-help or support groups, organizational development interventions.)

Transfer of learning is the effective application by program participants of what they learned as a result of attending an educational program. It is often referred to as the "so what" or "now what" phase of the learning process. "So what does this all mean, and how can what was learned be applicable to my situation?" It is a particularly critical part of the training process when concrete results are demanded by participants and sponsors of educational programs. Not all educational programs require a plan for this part of the process; however, for many programs, it is essential that a plan be developed for helping participants apply what they have learned.

Assisting people to make changes is what transfer of learning is all about—changes in themselves, other people, practices, organizations, and/or society. Although most educational programs focus on the learning of individuals, often some of what has been learned cannot be applied unless changes are also made in current practices, organizations, and/or marketplaces. This is especially so when what is learned has to be applied primarily in a specific work or other organizational setting and/or depends on others having to agree to or also make those changes.

5.2 Factors Influencing the Transfer of Learning

There are several reasons to explain why participants either do or do not apply what they have learned as a result of participating in educational programs. Examples include the perceptions of program participants about the value and practicality of program content, the presence or absence of follow-up strategies as part of the program design, and supervisory and organizational attitudes toward changes required to apply what has been learned. The following six key factors can be barriers or enhancers to the transfer of learning process:

- *Program participants.* Participants bring to educational programs a set of personal characteristics, experiences, and attitudes and values. These influence both what they learn and whether they can and want to apply what they have learned.
- *Program design and execution.* Educational program planners can include as part of designing and conducting educational programs strategies for the transfer of learning. These strategies can be implemented before, during, and/or after the program has been completed.

- *Program content.* The knowledge, skills, and/or attitudes/values that are addressed through the program activities make up the program content. Program participants may or may not learn this material, either because they choose not to or because the program instructors did not teach what they said they would teach or both.
- *Changes required to apply learning.* The nature of the changes required in people, professional practices, organizations, communities, and/or the greater marketplace to apply the learning describes the scope, depth, and enduring consequences of those changes. It also takes into account the complexity of the change process and who is responsible for making the changes.
- *Organizational context.* The organizational context consists of the people, structure, and cultural milieu of an organization, and it either supports or inhibits the transfer of learning. The context includes the value the organization places on continuous learning and development and the concrete support it gives to educational programs.
- *Community/marketplace forces.* The general social, economic, and political conditions that exist also play a role. This factor includes support by key leaders and groups in the marketplace, community, region, and/or international arena.

CHART VII

Examples of Barriers and Enhancers for the Transfer of Learning

<ul style="list-style-type: none"> ■ Do not possess required prior knowledge or experience. ■ Do not have the time to incorporate what they have learned into professional setting. ■ Are not interested in making changes . 	Program Participants	<ul style="list-style-type: none"> ■ Have useful prior knowledge and experiences and can link new learning. ■ Are ready and willing to learn and to apply that learning. ■ View the program content as relevant and practical.
<ul style="list-style-type: none"> ■ Instructional methods lack emphasis on application. ■ Exclude follow-up strategies. ■ Offer unrealistic transfer-of-learning strategies. 	Program Design and Execution	<ul style="list-style-type: none"> ■ Highlight application exercises in the instructional activities. ■ Ensuring that transfer-of-learning happens. ■ Include transfer-of-learning strategies that are well executed.
<ul style="list-style-type: none"> ■ Focuses on knowledge when it is skill and attitude changes that are needed. ■ Is not relevant or usable. 	Program Content	<ul style="list-style-type: none"> ■ Is relevant and practical. ■ Builds on previous knowledge and experience of participants.
<ul style="list-style-type: none"> ■ Are unrealistic. ■ Are too disruptive to present practices/ routines. 	Changes Required to Apply Learning	<ul style="list-style-type: none"> ■ Are doable and realistic. ■ Are allotted enough time to develop. ■ Occur in an environment where the change process is perceived as constructive and equitable.
<ul style="list-style-type: none"> ■ Lacks concrete support from peers, superiors, and/or managers. ■ Builds in reward systems that work prevent change. ■ Nonsupportive climate for learning. 	Organizational Context	<ul style="list-style-type: none"> ■ Offers support from key leaders and superiors. ■ Makes tangible rewards apparent. ■ Adapts to new structures and norms.
<ul style="list-style-type: none"> ■ Nonsupportive economic environment. ■ Key leaders resist change. 	Marketplace/ Community Forces	<ul style="list-style-type: none"> ■ Supportive economic environment. ■ Visible support from key leaders.

The more complex the scope and goals of the program, the larger the number of people affected, the greater the magnitude of the changes, and the less control over organizational and marketplace forces, the more difficult the transfer-of-learning process becomes. Program planners have varying levels of control over the decisions they can make related to the factors that influence the transfer of learning. For example, a program planning team consisting of a team of managers with authority to make organizational changes (such as procedures, and work objectives) has greater control over learning transfer. This span of decision-making control over the transfer function may remain constant for some program planners but be continually changing for others (depending on the specific programs they are planning).

Program planners have more control over some factors than they do others:

- Level 1 Program design and execution (most control)
- Level 2 Program participants, program content
- Level 3 Organizational context
- Level 4 Changes required to apply learning
- Level 5 Marketplace/community forces (least control).

Because the one factor that almost all program planners have the greatest decision-making power over is the design and execution of the program, it is important that planners consider planning for the transfer of learning an integral part of the planning process.

5.3 A Framework for Planning for the Transfer of Learning

To plan for the transfer of learning as part of the process of designing and conducting educational programs, three key elements need to be addressed: when the transfer strategies should be employed, the key players who need to be involved, and strategies that each of these players can use to help in applying what has been learned.

As for the timing, transfer strategies can be used before the program begins, while the program is in progress, and/or after the program is completed. Transfer strategies employed after the program is completed are usually the most difficult for program planners to influence, because of the cost and staff time that follow-up activities usually require.

Key players are the people and/or groups who need to be involved to have the transfer of learning actually happen. Program planners must take into consideration the participants, others who have been involved in the planning process, and the program instructors in preparing transfer plans. In addition, there may be other key players who, though not involved in programs, need to be included in transfer plans. For example, in work situations, colleagues, supervisors, and/or senior managers may be critical players. To ascertain key players, program planners contemplating transfer plans need to consider whether the changes related to the applications of learning are being newly initiated, are in progress, or simply need to be maintained.

Where people and/or organizations are in the change process affects both who needs to be involved in the transfer-of-learning process and the strategies to be employed.

The final element that needs to be considered in planning for learning transfer is determining what strategies or methods are the most useful in assisting participants to apply what they have learned to their work. Examples of various strategies, along with an indication of when they are most useful in the planning process and who is most likely to use them follow:

CHART VII

Transfer of Learning Strategies

Strategies							
Involve key people in the planning process	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pretrain supervisors of participants	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
Have participants select projects to complete prior to the start of a program	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Build into organizational policies, practices, and procedures (for example, personnel systems) recognition for meeting the goals of educational programs	<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
Develop individualized learning plans or contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the formal supervisory process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Provide mentors for participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Use organizational development interventions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Involve people in conducting the program (for example, in on-site coordination and instruction)		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use applications exercises and simulations		<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
Use participant self-assessments for what has been learned and what participants believe they can apply		<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
Give assignments/activities that need to be completed after the program		<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
Provide a session on reentry advice		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Develop individual action plans		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Develop self-help groups		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Develop support groups		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Supply and use job aids and other resource materials		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Model skills or attitudes/values needed for learning transfer		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Provide and use peer coaches or teachers			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Develop self-monitoring instruments and techniques			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Involve key players in follow-up activities			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Schedule learner refresher sessions			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

TASK SIX

Formulating Evaluation Plans

6.1 Objectives

- Specify the evaluation approach or approaches that will be used including the use of informal or unplanned evaluation opportunities.
- Determine how the evaluation data will be collected (for example through observations, questionnaires, tests).
- Think through how the data will be analyzed, including how to integrate the data that was collected through any informal evaluation processes.
- Describe how judgments will be made about the program, using predetermined and/or emergent criteria for program success.
- Develop recommendations for current and/or future programming directions based on the judgments that were made and suggest ideas for how to address these recommendations, including what resources would be needed.

6.2 Program Evaluation Defined

Program evaluation is a process used to determine whether the design and delivery of a program were effective and whether the proposed outcomes were met. Evaluation is a continuous process that begins in the planning phase and concludes with follow-up studies. Evaluation done to improve or change a program while it is in progress (even in the planning phases) is termed *formative* evaluation. When evaluation focuses on the results or outcomes of a program, it is called *summative* evaluation.

The objective of program evaluation is judging the value or worth of an educational program. This is not an easy task for three major reasons:

- It may be difficult to demonstrate that program outcomes are really tied to what happened in the program. Factors other than what participants did as part of a planned program and transfer-of-learning activities may account for the occurrence or nonoccurrence of changes.
- Developing clear criteria upon which judgments can be made may be hard to do, especially for program outcomes that are not quantifiable or that are unclear at the onset of the program. Even for those outcomes that are quantifiable, the time and effort it takes to formulate the types of measures needed and to collect and analyze the data may not be reasonable in terms of current program resources.
- Some program planners may not want to make judgments about their programs or have others make those judgments. This is especially true in environments where evaluations of any kind are seen as punitive.

Good program evaluation provides useful feedback to program planners, participants, supervisors of participants, managers and administrators, community groups, and other interested parties and accomplishes the following:

- Focuses staff on the goals and objectives of the program
- Provides information for decision making on all aspects of the program
- Identifies improvements in the design and delivery of the learning events
- Increases application of the learning by participants
- Allows for program accountability
- Provides data on the major accomplishments of the program
- Identifies ways of improving future programs

6.3 Planning for Systematic Program Evaluation

There is no one acceptable systematic process for conducting a program evaluation. Consequently, a number of descriptions of the process have been developed. A composite description of how to design a systematic evaluation process consisting of twelve steps follows. For each step, operational guidelines and an example from practice are provided.

CHART VIII

Planning for Systematic Program Evaluation

Steps	Operational Guidelines	Examples
Secure support for the evaluation from those who have a stake in the results (for example, funding agencies, senior management, program staff, community groups).	Receiving written and/or verbal support from those who will be most affected by the evaluation is key. This support may take the form of memos, formal agreements, public announcements, and the like. What should be clear is the scope of the evaluation and the general time frame for completion.	The training manager has received two memos, one from the MCSD Director and a second from the major funding agency that endorses the overall scope and timeline for the planned evaluation.
Identify the individuals to be involved in planning and overseeing the evaluation.	An individual or team of individuals should be designated to plan and oversee the program evaluation process.	Two staff members from the training department are responsible for the overall design and execution of the evaluation. They will consult with other groups (managers/administrators, participants, funding agency) as needed.
Define precisely the purpose of the evaluation and how the results will be used.	The purpose of the evaluation should be stated clearly and understood by all parties involved. It is especially important to meet the expectations of the major stakeholders in the program (for example, participants, supervisors of participants, funding agencies).	The major purpose of the evaluation is to determine whether a specific educational program has produced a major change in the knowledge, skill level, and/or attitudes of the participants. A secondary purpose includes the improvement of the training department itself.
Specify what will be judged and formulate the evaluation questions.	Major areas that can be judged: <ul style="list-style-type: none"> • Participant learning • The educational program itself (for example, format, content, staff) • Outcomes of the program (such as changes in individuals or the MCSD). • The policies, procedures and practices of the educational unit/function (for example, the program planning process). • The impact of a program on subunits or whole organizations. • The impact of a program on communities/ society. 	The major areas to be assessed are the changes in knowledge and skills (with the educational unit itself secondary). The evaluation questions are these: <ul style="list-style-type: none"> • Was there a change in the knowledge, skills, and/or attitudes of the participants as a result of the program? • Was this change in knowledge, skills) and/or attitudes maintained over a twelve-month period? • How could the training department be changed to better meet the requirements of the major funding agency and the organization as a whole?
Determine who will supply the needed evidence.	Evidence can be gathered from a number of people, such as participants, their supervisors, program staff members, instructors, administrative/ management personnel, customers, community members, and outside consultants.	Evidence will be gathered primarily from participants, their supervisors, and the funding agency. Training department staff will also be asked to supply some of the data.

Planning for Systematic Program Evaluation

Steps	Operational Guidelines	Examples
Specify the evaluation approach to be used.	The chosen approach should match the purpose of the evaluation) the nature of the program, and the evaluation questions. The optimal choice of approach may not always be the <u>most</u> feasible or practical.	An objectives-based approach will be used. The objectives to be focused upon are those related to participant learning and the operation of the educational unit.
Determine the data collection techniques to be used and when the data will be collected.	The techniques and timing of data collection should be primarily determined by the purpose of the evaluation and the approach chosen. In addition, characteristics of the respondents, the expertise of the evaluators) and the time and cost requirements should be considered.	Three primary techniques will be used to conduct the evaluation: interviews, written questionnaires, and a review of performance records. Data will be collected prior to the program, at the end of the program, and nine months after the program has been completed.
Specify the analysis procedure to be used.	The analysis procedures should be related directly to the evaluation questions, the approach, and the kind of data collection techniques used. For quantitative data, they can range from simple numerical counting or computing of percentages to very sophisticated statistical analysis. Qualitative data are usually reported in prose form, though some simple numerical tables are also used.	As the quantitative data are at the nominal level, the analysis will consist of frequency counting and a chi-square statistical procedure. The qualitative data from the interviews will be analyzed for patterns and general themes.
Specify what criteria will be used to make judgments about the program or what process will be used to determine the criteria.	The criteria chosen should indicate the level of learning or change that will be considered acceptable. Criteria should be set for each major evaluation question. For programs where the criteria cannot be predetermined, a process for how criteria will eventually emerge should be outlined.	<ul style="list-style-type: none"> • Participants must be able to demonstrate at the end of the program that they have acquired at least 90% of the knowledge and skills presented. 80% of the participants must demonstrate at least 75% mastery of the knowledge and skills nine months after completion of the program. • Participant attitude changes will be assessed through the patterns and themes revealed from the interview data. • The training department must demonstrate at least five major changes they have made in policies, procedures, and/or productivity that better meet the requirements of the funding agency and the organization.

Planning for Systematic Program Evaluation

Steps	Operational Guidelines	Examples
Determine the specific timeline and the budget needed to conduct the evaluation.	The timeline may be set and specific (such as before and after a specified program) or be continuous (as in the recording of change in the learning of participants for all programs). Program evaluations cost money, so a realistic budget should be negotiated prior to initiating the process.	The timeline for the quantitative evaluation is this: <ul style="list-style-type: none"> • Pretest 1: April • Pretest 2: June • Pretest 3: August • Treatment: September • Posttest 1: October • Posttest 2: March Qualitative data will be collected throughout the project. The budget for the evaluation has been set at \$3,000 (excluding staff time).
Complete the evaluation, formulate recommendations, and prepare and present an evaluation report.	The evaluation report should be clearly and precisely written and should focus on the purpose(s) for the evaluation. Recommendations for changes and future actions should be realistic and should include action strategies for addressing those recommendations. This report should be presented in written form and/or orally to key stakeholders.	An evaluation report will be prepared highlighting participant learning and the changes in the training department. Also included will be recommendations related to future programs and the division itself. The report will be distributed to the vice president and her staff, the head of the funding agency, and the staff of the division. Oral presentations will be given by request.
Respond to the recommendations for changes in the overall program, specific learning activities, and/or the educational unit or function.	Recommendations should be acknowledged and, where appropriate, implemented in a timely fashion. Key stakeholders and those affected by the recommendations should be kept informed and, as needed, involved in the change process.	Although it was recommended that this program should be continued, changes were suggested by participants in the format and the instructional methods used. In addition, the funding agency suggested that some of the content be revised. These changes were made and reported back to the participants in an in-house newsletter and the funding agency through three planning sessions. No further recommendations were made concerning the operation of the training department.

Although systematic program evaluations are a desirable and necessary part of the programming process, program planners must be aware of four major assessment pitfalls.

- 1) The outcomes of some educational programs may be too complicated, and the number of variables affecting those outcomes too numerous to allow planners to demonstrate that a given program actually produced the desired changes. For example, it appeared that one three-week (two hours per day, twice a week) training program increased the proficiency of staff in the use of a new computer networking system. This conclusion was reached by comparing pretest and post-test scores of all workshop participants on the use of the system once the program was completed. Yet when the participants were asked what key element had helped them to increase their proficiency, 95 percent cited on-the-job trial and error. They said that the training program had, in fact, hindered their progress more than helped, because the instructor often gave poor and incomplete descriptions of how to use the new system.
- 2) However scientifically rigorous certain evaluation procedures are constructed, they may not be able to provide hard evidence that the more subtle or most critical aspects of the educational program have been achieved. This is especially so for educational programs whose objectives are to foster major changes in organizational effectiveness.
- 3) Conducting systematic program evaluations costs time and money, neither of which may be available if organizational managers see no immediate payoff or value for evaluating programs.
- 4) When staff know that no action will or can be taken on the basis of evaluation findings, it may be better not to collect the data at all, because the evaluation process raises expectations on the part of participants and/or sponsors that changes will be forthcoming.

6.4 Approaches to Program Evaluation

There are several educational program evaluation models. Each integrates a framework with relatively explicit perspectives and procedural methods for conducting evaluation. Because evaluation is often a multifaceted endeavor, more than one approach or model may be employed in combination in the evaluation process.

Salient examples of evaluation approaches, along with sample questions and data collection techniques appropriate for each approach are provided below. There are overlaps, commonalties of focus, and techniques between and among the approaches. The broadest overlaps are between the objective-based approach and the “levels of evaluation” approach, because these models focus on similar areas. In addition, some of the approaches, for example the case study method, are sometimes utilized as part of the data collection and analysis process for other approaches.

The “levels of evaluation” approach—more specifically, the participants’ levels of evaluation approach—is the most commonly applied form of evaluation. Participants are typically asked to complete a questionnaire indicating their opinion on such items as content, instructions, instructional techniques, or facilities. They are sometimes

asked to list the strengths and weaknesses of the program, describe what they perceive they have learned, and offer recommendations for future activities.

Soliciting participants' reactions is most often done at the end of the program. In addition, some program planners like to request participant feedback for individual sessions within longer programs. For example, at workshops and conferences where there are large group presentations, evaluation data are sometime collected at the end of each session. When evaluation data are generated for individual sessions, these data are used in two ways; to provide feedback to individual instructors and presenters and to contribute to a larger data set focused on evaluating the program as a whole. Two examples of participant reaction forms one brief ad one more comprehensive follow:



(Short Participant Questionnaire)

Title of Program: _____ Date: _____

Please circle the ratings that best describe your reaction to this session:

1 = No 2 = Somewhat 3 = Yes, definitely

1. Were the session objectives clear? 1

2

3

2. Were the instructional techniques and materials helpful in your learning of the material? 1

2

3

3. I would rate the instruction overall 1

2

3

4. I would rate the program overall

1

2

3

5. Some information and/or skills I can use from the program:

6. Some suggested improvements for this program:



(Long Participant Questionnaire)

Title of Program: _____ Date: _____

Please assist us in evaluating the quality of the program by completing this questionnaire. For each question, circle the number that best represents your view: 1 ("No"), 2 ("Somewhat"), and 3 ("Yes, definitely"). Your specific comments and suggestions for improvement would be most appreciated, especially for those items you marked "No" or "Somewhat."

Have you had prior experience and/or training in this content area? If so, what?

Part 1: Session Content and Process

1. Were the program objectives clear and realistic? 1

2

3

Comments/suggestions:

2. Did you learn what you expected to learn? 1

2

3

Comments/suggestions:

3. Was the material presented relevant and valuable to you? 1

2

3

Comments/suggestions:

4. Was the material presented at an appropriate rate? 1

2

3

Comments/suggestions:

5. Was there an adequate amount of time allotted to each topic? 1

2

3

Comments/suggestions:

6. Did the instructional and presentation techniques used adequately assist you in learning the material?

1

2

3

Comments/suggestions:

7. If there were opportunities for you to actively participate in the various sessions, was this participation beneficial to you?

1

2

3

Comments/suggestions:

8. Could you relate the material to your particular life situation?

1

2

3

Comments/suggestions:

9. Did the instructional materials and aids used (transparencies, manuals, videotapes, and the like) enhance the learning process?

1

2

3

Comments/suggestions:

10. Was the program well organized and effectively conducted?

1

2

3

Comments/suggestions:

Part 2: Presenter Skills*

1. Were the presenters enthusiastic? 1

2

3

Comments/suggestions:

2. Were the presenters well prepared? 1

2

3

Comments/suggestions:

3. Did the presenters have expert knowledge of the content? 1

2

3

Comments/suggestions:

4. Did the presenters make an effort to help you feel comfortable? 1

2

3

Comments/suggestions:

5. Did the presenters provide you with adequate assistance in learning the material? 1

2

3

Comments/suggestions:

6. Did the presenters communicate well with the participants (for example, use 1

nonsexist language, attend to diversity of audience)?

2

3

Comments/suggestions:

7. Did the presenters hold your interest? 1

2

3

Comments/suggestions:

8. Did the presenters cover the content adequately in the allotted time? 1

2

3

Comments/suggestions:

Part 3: Logistical Arrangements

1. Were the registration procedures "participant-friendly"? 1

2

3

Comments/suggestions:

2. Was the program schedule well planned (allowing enough time between sessions
and for lunch, for example)?

1

2

3

Comments/suggestions:

3. Would you recommend that these facilities be used again?

1

2

3

Comments/suggestions:

4. Would you want the same food menus again for breaks and meals?

1

2

3

Comments/suggestions:



Part 4: Overall Program

1. Will you be able to apply what you have learned in your work, at home, and/or in your personal life?

1

2

3

Comments/suggestions:

2. Were you challenged by the content and the way the material was taught?

1

2

3

Comments/suggestions:

3. How do you rate the program overall?

1

2

3

Comments/suggestions

4. Please comment on the major strengths of the program and changes you would recommend.

Major strengths:

Suggestions for improvement:

Any other observations:

Thank You for Your Help!

A second approach that is also often used for program evaluation is the objectives-based approach. With this approach, program objectives serve as the basis for program evaluation. The purpose, design, and criteria for the evaluation are all drawn from these objectives.

6.5 Collecting Evaluation Data

There are a number of techniques that can be used to collect evaluation data. Each technique can be used alone or in concert with one or more techniques, depending on the purpose. Nine widely used techniques for collecting data follow along with a set of operational guidelines:

CHART IX

Approaches to Program Evaluation

Approach	Description	Sample Questions	Sample Data Collection Techniques
Objectives-Based Review	Determines whether stated, objectives of a program have been met. The focus of the objectives is on the participants' learning (with resulting changes in the individual, organizations, and/or society) and/or the program operations.	<ul style="list-style-type: none"> ■ Have the individual participants learned what they were supposed to learn? ■ Did the program contribute to changes in the organization? ■ Did the program contribute to changes related to societal issues and concerns? ■ Were specified changes made in the program operations? 	<ul style="list-style-type: none"> ■ Observations ■ Interviews ■ Written questionnaires ■ Tests ■ Performance reviews ■ Product reviews ■ Case studies
Systems Evaluation	Provides feedback on the effectiveness of the program planning and execution process, the structure of the educational unit/function, and the efficiency of the use of resources in relation to the outcomes of educational programs. One emphasis is cost-benefit analysis.	<ul style="list-style-type: none"> ■ Has the process of planning and implementing the program been effective and efficient? ■ Have resources been used wisely in relation to the benefits of the program? 	<ul style="list-style-type: none"> ■ Written questionnaires ■ Interviews ■ Cost-benefit analysis
Case Study Method	Gives a "thick description" of what a program looks like from the viewpoint of participants, staff, sponsors, and/or other appropriate groups. It characterizes how a program has been implemented and received.	<ul style="list-style-type: none"> ■ What are the prominent events/activities respondents would highlight? ■ What value do participants, staff, and stakeholders place on the program? ■ What are the program's strengths and weaknesses from the participants' perspective? 	<ul style="list-style-type: none"> ■ Observations ■ Interviews ■ MCSD records and documents

1 of 1

Approaches to Program Evaluation (continued)

Approach	Description	Sample Questions	Sample Data Collection Techniques
Quasi-Legal Evaluation	Determines program quality through hearings. Panels hear a range of evidence (for example, opinions, data-based studies, belief statements) presented in a legalistic fashion. The judgments rest with a majority opinion of the panel members.	Which point of view represents the best judgment about the value or worth of a program? Should the program be continued, modified, or eliminated based on a specified body of evidence?	<ul style="list-style-type: none"> ■ Interviews ■ MCSD records and documents ■ Product reviews ■ Tests ■ Cost-benefit analysis
Professional or Expert Review	Relies on a panel of experts making judgments, usually based on a predetermined set of categories and standards, about a program. It most often focuses on the resources, processes, and outcomes of large educational programs.	<ul style="list-style-type: none"> ■ Does the program meet a predetermined set of standards related to the processes and outcomes of the program? ■ Is the program doing what it claims it is doing? 	<ul style="list-style-type: none"> ■ Interviews ■ MCSD records and documents ■ Product reviews
"Levels of Evaluation" Review	Measures four different levels or areas: (1) participant reactions, (2) learning, (3) behavior change, and (4) results or outcomes. Focus is primarily on participant-reactions and changes and on organizational changes. This approach is most often coupled with the objectives-based model.	<ul style="list-style-type: none"> ■ Did participants like the program? ■ What knowledge or skills were learned? ■ What values or attitudes were changed? ■ What changes in participant behavior have resulted that can be linked to the program? ■ What overall impact has program had on the organization (for example, reduced cost, improved <u>quality</u>, <u>etc.</u>)? 	<ul style="list-style-type: none"> ■ Written questionnaires ■ Tests ■ Performance reviews ■ Product reviews ■ Cost-benefit analysis

Evaluation data can be collected at three major points: prior to the program, during the program, and after the program is completed. An overview of the types of information collected at these points and examples of where and how this information is gathered follows:

CHART X

Collecting Evaluation Data

Technique	Description	Operational Guidelines
Observations	Watching participants at actual or simulated tasks and recording the knowledge, skills, and/or values/attitudes participants display.	Determine whether these should be open-ended or formally structured with specific variables to investigate. Observers must have a clear picture of who, how, and what they are observing.
Interviews	Conversations with people (for example, participants, program planners, supervisors, customers) individually or in groups, either in person or by phone.	Determine whether these should be open-ended or formally structured (with specific questions to ask). For formally structured interviews, the interview schedule should be pilot-tested. Interviewers must listen to responses without judging.
Written Questionnaires	Gathering of opinions, attitudes, perceptions, or facts by means of a written series of questions.	Choose from among a variety of question formats: open-ended, ranking, checklists, scales, or forced choices. These can be administered by mail or given to individuals or groups to complete.
Tests	Paper-and-pencil or computer-generated tests used to measure participants' knowledge, skills, or values/attitudes.	Know what the test measures (knowledge, skills, or attitudes/ values) and use it as an evaluation tool for only those areas. In addition, make sure the test is both reliable and valid. Choose a test carefully. Check to see whether what it measures is important and relevant.
Product Reviews	Tangible items that participants produce as a result of the program (for example, written materials, portfolios, clay pots, rebuilt engines, flower arrangements, videotapes).	Clearly and precisely define the nature of the project and the criteria on which it will be judged. Participants, whenever possible, should be able to use the products.

Collecting Evaluation Data (continued)

Technique	Description	Operational Guidelines
Performance Reviews	Demonstration of a specific skill or procedure (for example, team building, responding to customer complaints, answering a health information line) in either a simulated or a real situation.	Identify specifically what the elements and criteria are for the performance to be evaluated. Determine what tool will be used in the process (such as checklist, rating scale, expert judgment) and ensure consistency.
Organizational/Community Records and Documents	Written materials developed by organizations and communities. Examples include performance appraisals, production schedules, financial reports, records of absenteeism or attendance, job efficiency indexes, annual reports, committee and board minutes, and records showing hours of training time and numbers of participants involved.	Systematically collect and record data so that they are easy to retrieve and sort.
Portfolios	A purposeful collection of a learner's work assembled over time that documents events, activities, products, and/or achievements.	Include items produced by the learners and attestations from others (for example, honors, awards certificates). These should be used as a vehicle for engaging learners in active reflection.
Cost-Benefit Analysis	A method for assessing the relationship between the outcomes of an educational program and the costs required to produce them.	Develop the cost side of the equation. Include both direct and indirect costs. Calculate the benefit side by focusing on either increasing revenues or decreasing expenses. Evaluators must have quantitatively measurable outcomes to use this technique.

Collecting Evaluation Data (continued)

When and Where Data Are Collected	Type of Data Collected	How Data Might Be Collected
Prior to the start of the program; at the program site and/or in the environment of the participant	Baseline data on participants' present knowledge, skills, and/or values/attitudes; group, organizational, or community/societal information (for example, policies, operating procedures, specific behaviors, expressed values/attitudes)	<ul style="list-style-type: none">■ Observations and interviews■ Review of group, organizational, and community records, reports, and so on■ Questionnaires■ Tests
During the program; at the program site	Data on participants' learning; participant and staff reactions to the program while it is still in progress	<ul style="list-style-type: none">■ Questionnaires■ Interviews■ Tests
Well after the program (follow-up studies); in the environment of the participant	Data on participants' knowledge level, performance, and/or values/attitudes; organizational information (for example, changes in policies, procedures, costs); community/societal information (for example, knowledge, actions, values/attitudes)	<ul style="list-style-type: none">■ Observations■ Interviews■ Reviews of organizational records■ Cost-benefit analysis■ Written documents■ Questionnaires■ Product/performance reviews

Evaluation data that are collected before, during, and at the close of programs may include information that is tied directly into the instructional processes. One example of this type of data is information that instructors request either prior to or at the start of a learning activity, such as the current knowledge or skill levels of participants in relation to the content being taught. A second example is the data collected either during or after the instructional portion to determine what participants have learned. For programs where only instructional data are collected, these data become the main criteria for making judgments about the value of the program. For example, if the major objective of a program is to teach individual participants specific skills, then the only data needed might be those that are collected during the instructional phase. For educational and training programs that have objectives beyond individual change, the evaluation data generated as a part of the instructional portion of the program are only part of the data bank that is needed.

6.6 Data Analysis

Two major types of data are generated from program evaluations: quantitative and qualitative. Quantitative data give precise numerical measures while qualitative data provide descriptive insight.

6.6.1 Evaluation Focusing on Participants' Learning

Quantitative - Participants take tests that measure changes in their knowledge or skill levels. The test scores are recorded in the training records and compared to pretest scores.

Qualitative - Observations are made by the instructors on the extent of change in participants' knowledge or skill levels.

6.6.2 Evaluations Focusing on Program Operations

Quantitative - Using a five-point scale, department heads and selected participants rate specific procedures and practices of the educational unit, for example, ways program ideas are generated, program formats, or how participants and programs are chosen. These ratings are then compiled, analyzed, and a numerical summary is given to all education staff.

Qualitative - Department heads and staff are interviewed, using open-ended questions about their perceptions of the effectiveness of the educational unit.

For some evaluations, only quantitative data or qualitative data are needed and, for others, both types of data are required. In addition, some program evaluations rely on single data sources such as questionnaires or performance demonstrations, whereas others require multiple data sources before complete responses to evaluation question can be provided. The practice of single and multiple data sources linked to specific evaluation question, data collection techniques, and resulting types of data is demonstrated by the following:

CHART XI

Interrelated Issues of Data Collection in Evaluation: Single Data Source

Sample Evaluation Questions	Sample Data Collection Techniques	Kinds of Data
What new skills were learned by participants as a result of the train-the-trainer program?	Observations of participants before and after training	Qualitative Quantitative
Did participants feel that the instructors were effective and the content was useful in the program on communication skills?	Questionnaires administered right after the program	Quantitative
Did the participants believe that the information and skills taught them through a series of seminars were useful?	Interviews a month after the seminar series was completed	Qualitative Quantitative
Was there a reduction in the rate of turnover for new employees that could be attributed to the orientation program?	Review of MCSD turnover rates for new employees three months after the program	Quantitative

Interrelated Issues of Data Collection in Evaluation: Multiple Data Sources

Sample Evaluation Questions	Sample Data Collection Techniques	Kinds of Data
What changes in the participants' job performances were an outcome of the leadership development program?	On-the-job observations, interviews, and performance appraisals three and then six months after the programs	Qualitative Quantitative
As a result of the training program) are the training staff effective instructors and/or coordinators of educational programs?	Questionnaires, observations, and interviews three months after the program	Qualitative Quantitative
Did the training of staff in total quality management (TQM) result in a cost savings to the MCSD?	Review of MCSD records and a cost-benefit analysis on a quarterly basis for two years	Quantitative
Are more and different groups of MCSD customers utilizing MCSD services as a result of educational programs.	Review of bookkeeper and other client data over a six-month period.	Quantitative

Interrelated Issues of Data Collection in Evaluation: Multiple Data Sources (continued)

Evaluation Question	Criterion	Findings Based on Analysis Process	Interpretation and Conclusions
<i>Participants' learning</i> - Did the participants in the program on supervisory skills gain sufficient knowledge in this content area?	Participants will score 85% or better on a knowledge test of supervisory skills.	Thirty-eight of the forty participants scored 85% or better on a knowledge test of supervisory skills.	The majority of participants mastered the material; thus the program was termed highly successful.
<i>Focusing on program operations</i> - Are the program staff effective instructors and facilitators for in-house educational programs?	The staff will achieve a four-point rating or better on a five-point scale on their skills as instructors and facilitators. The data will be drawn from twenty-five randomly selected programs over a six-month period.	All but one of the staff were given an overall four-point rating based on the data drawn from twenty-five program evaluations of randomly selected educational programs.	The staff as a whole were seen as very effective instructors and facilitators for in-house educational programs.
<i>Focusing on MCSD organizational issues</i> - Was there a reduction in the turnover rate for new employees that could be attributed to the orientation program?	There will be a reduction of 20 % in the turnover rate of new employees over a six-month period.	The turnover rate was reduced by 10% during a specified six-month period.	The orientation program did not produce the desired effect. Therefore, the problem of high turnover needs to be examined for alternative interventions (for example, changes in supervisory behavior or working conditions).
<i>Focusing on marketplace issues</i> - Was there an increase in the number of MCSD staff who participate in and contributed to Egyptian marketplace meetings, conferences, and activities.	There will be a 5 percent increase in the number of MCSD staff who attend and contribute to marketplace conferences and events.	The percentage of MCSD staff participating in Egyptian marketplace conferences and events increased an average of 8%.	Since the increase in the percentage of MCSD participants exceeded program goals, the educational efforts were highly successful.

6.7 Making Judgments About the Program

Program planners make judgments on the worth of the program as they interpret the data compiled during the analysis phase. This judgment process involves bringing together various pieces of the information gathered and supplying answers to the evaluation questions. Was what the participants learned worthwhile? Were the objectives of the program addressed in an effective and efficient manner? Do the management and administrative personnel believe the educational program gives vital assistance in fulfilling the mission and goals of the organization? These judgments provide the basis for making final conclusions and recommendations concerning the content and the operation of the educational program.

Judgments about programs should be based primarily on criteria related to the program processes and/or outcomes and should be reached by comparing results of the data analysis with the criteria that were set for each evaluation question or objective. For those criteria that were predetermined and are measurable, the judgments are simple: the changes produced by the program either meet the criteria as stated or they do not.

6.8 Examining Program Failures

In interpreting the evaluation data on an educational program, both the successes and the failures should be examined in terms of the realities of the situation. Often only the successes are highlighted and the process of trying to understand the failures is neglected. *There are four main types of problems that cause educational program failures:*

- Type 1 problems - Planning for the program is partially complete but is terminated before program implementation. Likely causes of this type of failure include unclear organizational goals or mandates; incomplete knowledge of resource constraints; excessively costly or complex design plans; or lack of follow through.
- Type 2 problems - Planning for the program is completed, but is cancelled because it does not attract sufficient enrollment. Likely causes of this type of failure include inappropriate pricing, scheduling or location; poor marketing; more attractive competition, or inadequate support services.
- Type 3 problems - Planning is completed and the program is offered, but the program does not provide the participants what they expected. As a result, participants either fail to complete the program or react negatively to it. Likely causes of this type of failure include poor instructors; poor coordination; unclear objectives; mismatch between content and the participants' needs; or poor quality of non-instructional resources.
- Type 4 problems - The program is offered and the participants express satisfaction, but there is clear evidence that the program failed to achieve the goals and objectives for which it was designed. Likely causes of this type of failure include ineffective instruction; unclear objectives; miscommunication of objectives; unrealistic expectations; mismatch between objectives and program format and instructional techniques; or inadequate provision for transfer of learning.

6.9 Formulating Recommendations

One of the final steps in the evaluation process is formulating recommendations concerning the educational program. The recommendations should focus on both reviewing the current program and planning future programs. Recommendations can be made regarding program planning and delivery, program content, program outcomes and impact, ideas for new programs, and how the educational function could more effectively serve the organization. For example, it might be recommended that administrators and managers become more active in the planning programs for their staff.

The program recommendations should be grouped by major issues or topics, address the original evaluation questions, and include any new observations that might have emerged. Each recommendation should also include clearly described strategies for addressing the recommendations and a list of the resources needed to respond.

Recommendation regarding further evaluation efforts may also be helpful. These recommendations could address such issues as the usefulness of the evaluation questions, the appropriateness of the evaluation approach and the data collection techniques, and the clarity of analysis and reporting procedures. For example, specific recommendations could be made concerning the format and questions on an instrument used to gather evaluation information.

TASK SEVEN

Determining Formats, Schedules, and Staff Needs

7.1 Objectives

- Choose the most appropriate format or combination of formats for the learning activity (for example individual, small group, large-group, or distance learning formats)
- Devise a program schedule that best fits the format(s) chosen and the participants.
- Identify staff needs (that is, program designers, program coordinators, instructors/facilitators, and program evaluators).

7.2 Program Formats

Program format refers to how educational activities are structured and organized. Five types of formats are used in educational and training programs:

- 1) Individual formats
- 2) Small group formats
- 3) Large group formats
- 4) Distance learning formats
- 5) Community learning formats

7.2.1 Individual formats include the following:

- Apprenticeship - A formal relationship between an employer and employee by which the employee is trained through practical experience under the supervision of experience workers.
- Coaching - One-on-one learning by demonstration and practice, with immediate feedback, conducted by peers, supervisors, and/or experts in the field.
- Programmed instruction - Use of programmed texts and booklets. Material is presented in a planned sequence of steps, with immediate feedback given on the extent of a person's learning.
- Self-directed learning - A form of study in which learners have the primary responsibility for planning, carrying out, and evaluating their learning experiences.
- Mentoring - An intense relationship in which someone with experience works with a less experienced person to promote both professional and personal growth. Mentors model expected behavior and values and provide support and a sounding board for the protégé.
- Clinical supervision - A collegial practice designated to support and provide feedback to experienced staff who generally are good at what they do. The process, consisting of five steps (pre-observation, conference, observation and data collection, analysis and strategy session, follow-up conference, and post-conference), is used to refine practice.

- On-the-Job Training - Instruction provided by a master or expert worker to a novice while both are on the job and engaged in productive work. This format is often used when the work is complex and the worker or craftsman is the best person to pass on the knowledge and skills to other workers.
- Computer-Based Instruction - Delivery of instruction by a computer. This instruction may take the form of drill and practice, tutorials, simulations, modeling, and problem solving.
- Electronic Mail - The exchange of correspondence by way of computer. Although the correspondence can be much like traditional mail, it moves instantaneously from sender to receiver.

7.2.2 Small group formats include the following:

- Courses/classes - Groups with a definite enrollment that meet at predetermined times for the purpose of studying a specified subject matter under the direction of an instructor. These classes may be part of a distance-learning program or be held at only one site.
- Seminars - A focus on learning from discussions of knowledge, experiences, and projects of group members. Participants in these groups must have knowledge and skills in the content of the seminar. Instructors act primarily as resource persons and facilitators.
- Workshops - Intensive group activities that emphasize the development of individual skills and competencies in a defined content area. The emphasis in this format is on group participation and products.
- Collaborative research projects - Groups of people working together to research questions related to practice. The final product would include both research findings and conclusions and an action plan related to this material.
- Clinic - Sessions that focus on a single problem or skill as participants present case illustrations of practice problems to an expert or panel of experts. The experts serve in consultant roles.
- Trips/tours - A group field visit for on-site observation and learning. Trips provide the opportunity for further experiences with people, places, and situations that cannot be found in a formal classroom setting.
- Decision Support Labs - Groups of learners, using an interactive computer network can make group-decisions and learn a variety of decision-making and problem-solving techniques.

7.2.3 Large group formats include the following:

- Conferences/conventions - One or more days of meetings, one of the primary purposes of which is education - to present information, exchange experiences, improve skills, learn new skills, and/or engage in problem-solving activities. Sessions include large and small group meetings, and a variety of instructional strategies.

- Networks - Loosely configured groups of people with similar experiences, interests, problems or ideas who come together to give and receive information and to provide mutual support and assistance.
- Institutes - Intensive sessions, usually over several days, emphasizing the acquisition of knowledge and skills in a specialized area of practice.
- Lecture series - A series of presentations by one or more speakers who offer material on a given topic over a specified period of time.
- Exhibits - a stationary display of ideas, products, and/or processes. Resource people may be available to respond to questions about the content of the exhibit.

7.2.4 Distance learning formats include the following:

- Correspondence study - Prepared printed instructional materials (e.g. course syllabi, manuals, tests, and worksheets) that are delivered to the home or office. Participants engage in reading and/or other learning activities and send assignments to instructors to evaluate.
- Audio-conferencing - The linking of one or more sites by telephone to provide for live, interactive verbal exchanges of information between and among program participants and instructors. Conference phone and networks are used to enhance group interaction.
- Video-conferencing - Delivery of educational programs via one-way video or two-way video to one or more locations. With two-way video, distinct sites can send and receive both notion video and audio.
- Broadcast/cable television - Educational programs transmitted by private and public broadcasting stations as well as cable television companies. The television production may stand-alone or be part of a larger program effort (e.g. college courses that are offered via television).
- Satellite communication - Delivery of video and audio educational programs that can be picked up by satellite reception dishes. This does not generally provide for interaction between and among learners.
- Internet delivery - Interactive learning programs are offered over the Internet and integrate video, computer aided instruction, real time broadcast, video, taped-audio, email and chatroom correspondence.

7.2.5 Industry/community learning formats include the following:

- Resource centers - Centers that offer learning opportunities to individuals and groups within the industry/community.
- Industry/community development - Centered on educators who serve as resource people or consultants to action-oriented groups focusing on community change. The community serves as the laboratory for learning.
- Industry/community task groups - Groups that are formed for the primary purpose of organizing activities that foster learning and development.

Scheduling the program: Once the format is chosen, program planners can identify the appropriate length and breakdown of the program and set specific dates and program schedules. In finalizing dates for the program, planners must take care that the times chosen fit into the participants' personal and/or job schedules. Few, if any, educational programs should be scheduled around times when the target audience may have other pressing commitments, such as a heavy work load.

7.3 Identifying Program Staff

Staff are needed to design, coordinate, conduct, and evaluate educational programs. One person may take on all these tasks or the task may be divided among a number of people, depending on the size and complexity of the educational function and the program being planned. However, the tasks are divided, *program planners must take on these four major roles:*

- Program designer - The entails such tasks as gathering ideas for programs, setting program priorities, developing objectives, planning transfer-of-learning activities, and preparing budget and marketing plans.
- Program coordinator - Individual(s) responsible for coordinating the program and ensuring that all housekeeping tasks related to planning, conducting, and evaluating the program are completed in a timely manner. Such tasks include arranging facilities, registering participants, and overseeing the on-site monitoring of programs. In carrying out this role, individuals may act as information givers, brokers, counselors, resource specialists, and/or administrators.
- Instructor/facilitator - Individual(s) responsible for designing and/or delivering the instruction and directly assisting participants to achieve their learning objectives using a variety of learning techniques and devices. The development of more complex instructional packages (e.g. mediated learning modules) requires staff with specialized expertise from instructional designers to production teams.
- Program evaluator - Individual(s) responsible for making judgements about the value and results of the program (after specifying what will be judged, by whom, and on what criteria).

Program staff, may be internal to the organization or they may be hired from the outside. Sometimes a mix of organizational personnel and external consultants are used. For example, while an internal staff person may coordinate and evaluate an educational program, outside consultants may be responsible for the design and delivery of that program. *Five factors are critical in selecting external consultants:*

- Caliber of the people - Are the individuals both competent and capable? Will they be credible to your organization and the participants?
- Quality of their materials - Are the materials the outside consultants will use or develop (e.g. manuals, transparencies, videos, computer programs) of good educational quality? Will these materials be useful to the participants?
- Adaptability - Are the outside consultants willing to adapt their materials and/or presentations to fit the specific needs of the organization?

- Scope and depth of available resources - Do the outside consultants add to the scope and depth of the present educational resources of the organization?
- Cost - Will the outside consultants cost more than internal staff for the same activity? If so, is the additional cost justifiable?

There are two primary sources for locating outside staff: Other organizations and private consulting firms. It is critical that program planners check out consultants carefully prior to signing a formal contract. This process should involve face-to-face discussions, a review of materials, and when possible, sitting in on a session the person or consulting groups is conducting. In addition, information about prospective consultants can be gathered by talking with knowledgeable colleagues and the consultants' former clients. In considering using university faculty as consultants, planners may find it helpful to also ask the opinion of current or former students of the faculty members.

Outside staff are usually paid in one of three different ways: by the hour, by the program, or by a percentage of income. No matter how they are paid, it is important that MCSD negotiate a written contract for services. The checklist below includes topics to be included in the negotiation process:

- Brief descriptions of the program, project, or services.
- A summary of the consultant's responsibilities (e.g. development of instructional modules, instruction, development and conducting program evaluation).
- Time requirements and schedule for which the consultant will provide services (e.g. two days of preparation work off-site and two days of program delivery time).
- Estimated costs for the consultant's professional fees and per diem expenses.
- Estimated costs for program materials and aids (e.g. media equipment, educational materials, shipping charges, handouts, participant evaluations, and certificates).
- Expectation for on-site support services.
- Project or service start and completion dates.
- Contract extension or termination conditions.
- Internal staff contact (e.g. project manager, principal, director of training).
- Procedures for billing for services and expenses (e.g. to whom should invoice be directed, required forms).
- Rights to use any copyrighted material to be distributed to students during the educational program and/or use such material after the contract is completed.
- Protection of the employing organization's intellectual property (e.g. statement promising nondisclosure of proprietary information).

TASK EIGHT

Preparing Budgets and Marketing Plans

8.1 Objectives

- Estimate the expenses for the program, including costs for the development, delivery, and evaluation of the program (for example, staff salaries, participant expenses, and cost of instructional materials, transfer-of-learning costs.)
- Determine how the program will be financed.
- Conduct a target population analysis to help determine the background and experience of the potential audience as one of the foundational pieces of the marketing plan.
- Select and prepare promotional materials.
- Prepare a targeted and lively promotional campaign, paying careful attention to the target audience, the type of promotional material you want to use, the time frame, and the cost.

8.2 Determining the Cost of Educational Programs

There are three basic kinds of costs associated with educational programs: development costs, delivery costs, and evaluation costs. Expense items in these categories usually include staff salaries, instructional materials, facilities, equipment, travel, promotional materials, and general overhead.

8.3 Determining How the Program will be Financed

The income sources for educational and training programs may vary. The primary income sources for educational programs are organizational subsidy, participant fees, government funds, and auxiliary organizations.

8.4 Marketing the Program

Marketing is an essential planning element to ensure the success of some educational programs, particularly when participation is voluntary and potential participants are not affiliated with the sponsoring organization. Successful marketing is a process for helping an organization to ensure adequate participation for a program and to communicate what the program is all about.

Knowing the background and experiences of the potential audience for a program is one to the first steps in developing a marketing plan. Completing a target population analysis is one way to determine which individuals or groups of people will or might be interested in attending the program offered. The target population analysis involves answering some or all of the following questions:

- How many people will be involved?
- At what times are the potential participants available to attend sessions?
- Where are the potential participants located?

- What are the ages of the potential participants?
- What are the educational levels of the potential participants?
- What can be assumed about the present and past knowledge, skills, and experiences of the potential participants in relation to the content being offered?
- What are the learning-style preferences of the potential participants?
- What are the potential participants' attitudes about educational and training programs? About the organizations or groups that are sponsoring these programs?
- Are the potential participants in any identifiable career stages that would influence the content or process of the program to be offered?
- Why do the potential participants want to enroll or be involved in the program?
- What are the costs (e.g. fees, loss of job time) to the potential participants for attending the program?

Target population analysis can be done in a number of ways. Program planners can use existing data based that contain the needed information, conduct interviews, do observations, and conduct surveys. The information obtained from this analysis can also be useful in choosing program formats and staff.

8.5 The Product, Price, and Place

Program planners need to know their "product" and must be able to provide a comprehensive and understandable description of the programs for which they are responsible. They also need to be able to choose the right product to fit the needs and desires of their audience.

If there is to be a cost charged for a program, the right price must be determined. How much are the potential participants, whether they be individuals, groups or organizations - willing to pay?

In setting prices, the actual cost of planning and implementing the program, the demand for the program, and the competition should be taken into consideration. Choosing where to offer an educational program is also important. The location should be consistent with the program design, audience and budget.

8.6 Promotion of Education Programs

Not all educational activities need to be promoted. Some are mandatory. Others are in such high demand that program planners select participants. For the most part, program planners must promote or sell their programs to the potential audience. Many programs fail because of poor promotion.

Promotion involves developing strategies and materials aimed at generating or increasing enrollments for educational program. *Examples of promotional materials and strategies used to foster interest in educational programs follow:*

- Brochures - A written document describing a specific program or series of programs (direct mail; placement in appropriate offices and public places; placement in participant packets; distributed by hand at appropriate meetings).
- Flyers and announcements - A single sheet promoting an activity to people with specialized interests (direct mail; postings on bulletin boards; placement in participant packets).
- Form letters - A letter that can be used (1) as a cover letter mailed with the brochure or other promotional material; (2) as a separate mailing to make a personalized appeal to a specific group of people (direct mail).
- Catalogues - An overview of educational programs and services with course descriptions included (direct mail, placement in offices and public display areas, in-person distribution through various departments or units of an organization).
- Posters - A sign used to attract attention about a specific program or event (bulletin boards and other appropriate places).
- Newsletters - An announcement about programs placed in organizational publications (distributed by the organization responsible for the publication).
- Electronic mail and electronic bulletin boards - Electronic media used to describe an upcoming program or event. These should be used only if potential participants are networked into the system and use this form of communication regularly (internal organizational electronic mail or more widely used communication networks external to the organization).

8.7 The Marketing Campaign

A clear picture of the target audience is the essential first step to a successful marketing campaign. It is equally essential that the marketing campaign be well planned. The planning phase includes building a promotional budget and determining how that budget will be spent. The third marketing step is preparing and distributing effective promotional material. The most popular promotional materials are brochures, announcements, and newsletter articles. Writing copy/text that is readable and attractive is key to this third step. *Suggestions for writing good promotional materials follow:*

- Define clearly the target audience—demographic characteristics, location - and indicate what type of promotional material; may be most effective.
- Keep it simple. Use short sentences and familiar words.
- Use as few words as possible. Say what you want to say, then stop.
- Use the present tense and action words to make the message have a sense of urgency.
- Use personal pronouns. Talk to the audience just as you would to a colleague.
- Do not use jargon and do not over punctuate.

- Emphasize benefits. Clearly outline what participants will learn and be able to do.
- Write with enthusiasm. Convince the potential participant to share your excitement.

Developing a fact sheet before writing the actual copy may be helpful. The questions on the fact sheet are the same ones that the program planners need to answer when preparing the actual program: who, what, where, why, and how.

8.8 Promotional Assets

Ascertaining and strengthening your promotional assets and capabilities is an important part of any marketing effort. *Program planners can use the following checklist for this task, rating each asset and capability as present, readily obtainable, or hard to obtain:*

- Personnel
- Copy writers
- Photographers
- Graphic artists
- Design specialists
- Desk-top computer publishers
- Clerical help
- Access to printers, duplicating equipment and/or print shops
- Access to copy machines for small jobs
- Up-to-date mailing lists
- Access to electronic mail and bulletin boards
- Access to a good reference library
- Access to good data related to potential participants.

TASK NINE

Designing Instructional Plans

9.1 Objectives

- Develop clear and understandable learning objectives for each instructional session.
- Select and sequence the content based on the participants' knowledge and experience, the nature of the content itself, and instructor preference.
- Choose instructional techniques that match the focus of the proposed learning outcomes and that you are capable of using (for example, lectures, case studies, role-playing, and metaphor analysis).
- Select and/or develop instructional materials that will enhance participant learning and assist in ascertaining whether the instructional event actually produced the desired result.
- Choose an evaluation component for each instructional unit that will enhance learning and assist in ascertaining whether the instructional event actually produced the desired result.

9.2 Developing Learning Objectives

Learning objectives describe the outcome of a specific educational activity. They should be set in the context of the program objectives (those focused on participant learning) so that there is a sense of continuity between the two sets of objectives. Learning objectives must be selected carefully because they set the tone and direction for what participants will be expected to do and learn during the instructional activity. In preparing learning objectives, the developer must have in mind a clear picture of the proposed learning outcomes for the instructional unit. There are four categories of learning outcomes:

- 1) Acquisition of knowledge
- 2) Enhancement of thinking skills
- 3) Development of psychomotor skills
- 4) Changes in attitudes

9.2.1 Learning objectives are useful for four major reasons, they provide:

- A. Consistency in the design of instruction.
- B. Guidelines for choosing course content and instructional methods.
- C. A basis for evaluating what participants have learned.
- D. Guidelines for learners to help them organize their own learning.

The focus of each learning objective should be the program participants. Therefore, objectives should be stated in terms of an opening statement (The participant will be able to...), an action verb, and a content reference, which describes the subject being taught.

In developing learning objectives, instructors and program planners sometimes have difficulty finding a variety of action words that fit each category of learning outcomes. *The following list of verbs is appropriate for constructing learning objectives:*

- *Acquisition of Knowledge:* To identify, to list, to define, to describe, to state, to prepare, to recall, to express, to categorize, to chart, to rank, to distinguish, to explain, to outline, to inform, to label, to specify, to tell.
- *Enhancement of Thinking Skills:* to reflect, to compare, to contrast, to catalogue, to classify, to evaluate, to forecast, to formulate, to investigate, to modify, to organize, to plan, to research, to study, to translate, to differentiate, to analyze, to compute, to devise, to review.
- *Development of Psychomotor Skills:* to demonstrate, to produce, to assemble, to adjust, to install, to operate, to detect, to locate, to isolate, to arrange, to build, to conduct, to check, to manipulate, to fix, to lay out, to perform, to sort, to construct, to draw.
- *Changes in Attitudes:* To challenge, to defend, to judge, to question, to accept, to adopt, to advocate, to bargain, to cooperate, to endorse, to justify, to persuade, to resolve, to select, to dispute, to approve, to choose, to feel, to care, to express, to reflect.

9.3 Selecting and Sequencing Content

The starting point for selecting the content is the learning objectives. It is wise to prepare a rough draft of proposed content by objective and then expand that draft into a detailed statement of content. *It is also useful to prioritize the content in terms of its importance and relevance:*

- What participants must know - Content that is essential to the objectives.
- What participants should know - Content that supplements the essential material and should be included if time allows.
- What participants could know - Content that is interesting and relevant but not essential for clear understanding.

The order or sequence in which the content is delivered is also important. There is no one way to order content. For example, should the content flow from general to specific or vice versa? Should it flow from abstract to concrete or concrete to abstract? *The ordering of the content depends on the participants' knowledge and experience, the nature of the content itself, and instructor preference:*

- Start the sequence with materials that are familiar to the participants and then proceed to new materials.
- Give participants a context or framework to use in organizing what they are to learn.
- Place easily learned tasks early in the sequence.

- Introduce broad concepts and technical terms that have application throughout the instructional process early in the sequence.
- Place practical application of concepts and principles close to the point of the initial discussion of the concepts and principles.
- Place prerequisite knowledge and skills in the sequence prior to the point where they must be combined with subsequent knowledge and skills.
- Provide for practice and review of skills and knowledge that are essential parts of tasks to be introduced later in the activity.
- Introduce a concept or skill in the task in which it is most frequently used.
- Structure objectives into closely related, self contained groups.
- Do not overload any task with elements that are difficult to learn.
- Place complex or cumulative skills later in the sequence.
- Provide for practice of required skills and review of concepts and principles in areas where transfer of identical or related skills is not likely to occur unaided.

9.4 Selecting Instructional Techniques

The following eight factors should be taken into consideration when choosing instructional techniques:

- Learning objectives - Is the focus of the objectives acquiring new knowledge, enhancing thinking skills, developing psychomotor skills, or changing attitudes?
- Instructors - Are the instructors capable of using the techniques and do they feel comfortable doing so?
- Content - Is the content abstract or concrete? What is the level of complexity and comprehensiveness of the material?
- Participants - How many participants will there be? What are their characteristics? What expectations do the participants have in terms of the techniques to be used and are they capable of learning through those techniques?
- Characteristics of the teaching techniques themselves - What can realistically be done with the techniques? How difficult are the techniques to use?
- Time - What time period is available?
- Cost - Are the costs associated with the techniques chosen realistic?
- Space, equipment, and materials - Are the space, equipment, and/or materials necessary to use the techniques readily available?

Of these eight factors, the first two, the focus of the learning objectives and the capability of the instructor to use the chosen techniques, are most critical. *To address*

the learning objectives factor, a variety of instructional techniques appropriate for each category of learning outcomes are listed below:

9.5 Acquisition of Knowledge

- Lecture - A one-way organized, formal talk is given by a resource person for the purpose of presenting a series of events, facts, concepts, or principles.
- Panel - A group of three to eight people present their views on a particular topic or problem.
- Group discussion - A group of five to twenty people have a relatively unstructured exchange of ideas about a specific problem or issue.
- Reaction panel - A panel of three or four participants react to a presentation of an individual or group of individuals.
- Screened speech - Small groups of participants develop questions seeking extemporaneous responds from resource persons.
- Symposium - A series of related presentations (three to six) are offered by persons qualified to speak on different phases to a subject or problem.
- Listening group - In groups, participants are asked to listen to or observe an assigned part of a speech, panel, or presentation.

9.6 Enhancement of Thinking Skills

- Case study - A small group analyzes and solves an event, incident or situation presented orally or in writing.
- Game - An individual or group performs an activity characterized by structured competition that provides the opportunity to practice specific thinking skills and actions such as decision making.
- Debate - A presentation of conflicting views by two people or two groups of people helps to clarify the arguments between them.
- Reflective practice - Thoughtfully reflecting on one's actions, including the assumptions and feelings associated with those actions, can be done individually or as part of a small-group discussion.
- Observation - After an individual or group systematically observes and records an event using a specific focus (e.g. leadership style, group interactions, instructor behavior) the data are analyzed and discussed (either one-on-one or in a group format).

9.7 Development of Psychomotor Skills

- Demonstration with return demonstration - A resource person performs a specified operation or job, showing others how to do it. The participants then practice the same task.
- Simulation - Participants practice skills in a learning environment that simulate the real setting in which those skills are required.
- Trial and error - Participants are encouraged to figure out individually or in groups a way to do a hands-on job effectively.
- Skill practice exercise - Participants repeat performance or a skill with or without the aid of an instructor.
- Behavior modeling - A model or ideal enactment of a desired behavior presented is via an instructor or videotape, usually followed by a practice session on the behavior.

9.8 Changes in Attitudes

- Role playing - The spontaneous dramatization of a situation or problem is followed by a group discussion.
- Simulation - This is a learning environment that simulates a real setting, with the focus on attitudes related to the situation presented.
- Storytelling - Participants recall stories about an experience that all or most group members have in common.
- Metaphor analysis - Participants construct metaphors (concrete images) that describe, in a parallel yet more meaningful way, a phenomenon being discussed.
- Exercise/structured experience - People participate in planned exercises or experiences, usually using some instrument or guide, and then discuss their feelings and reactions.
- Reflective practice - Thoughtfully reflecting on one's actions, including the assumptions and attitudes associated with those actions, can be done individually or as part of a small-group discussion.

9.9 Assembling Instructional Materials

The following seven guidelines are helpful for selection educational materials:

- Select material that fits the maturity, interests, and abilities of the participants.
- Select materials that fit with a particular learning activity.
- Maintain a balance in the types of materials used.
- Avoid the overuse of materials.

- Select materials that complement rather than duplicate other learning resources available.
- Choose materials that fit what is being taught.
- Select materials that are available now or can be designed in the needed time frame and can be delivered effectively in the environment where the learning activity is to be held.

A wide variety of instructional materials and aids can be used. A listing of effective materials follows:

- Worksheets, content outlines, observation guides
- Workbooks, manuals, programmed texts
- Books, articles, pamphlets, newspapers
- Flipcharts, chalkboards, white boards, easels
- Models, real objects, mock-ups, specimens, storyboards
- Photographs, maps, charts, diagrams, pictures, drawings
- Transparencies, slides, filmstrips
- Audiotapes, compact discs
- Computer programs
- Films, videotapes, television
- Multimedia presentations

9.10 Evaluation of the Instructional Process and Materials

Participants' evaluation of the materials and process is very useful. This evaluation can be done in a variety of ways, from questionnaires to small group feedback sessions to large group discussions. *Sample questions to guide participant reaction follow:*

- Were the handouts and other materials understandable and useful to you?
- Which instructional techniques were the most helpful to you in the learning process? Which were the least helpful?
- What was especially good about the sessions, and what could have been improved?
- Were the physical facilities comfortable and appropriate for the learning activities?

- Was the instructional climate welcoming, or did it inhibit your learning? Please give specific examples of factors that enhanced and/or blocked your willingness and/or ability to learn.
- Was the participation level appropriate and helpful to you as a learner?
- Were any points and/or specific skills covered that you do not understand or do not know how to do? What do you believe would help you in gaining a better grasp of the content?
- Did the instructor invite and encourage participation from the group and individuals?
- Were the instructional aids (e.g. overheads, videotapes, charts, and graphs) helpful, or did they distract from the presentation?

9.11 Evaluation or Results

The starting point for evaluating the results of the instructional unit is the learning objectives. The evaluation technique chosen needs to match the focus of the objectives - knowledge acquisition, enhancement of thinking skills, development of psychomotor skills, and/or changes in attitudes. *Some of the most widely used techniques for evaluating what has been learned by participants are listed below:*

9.11.1 Acquisition of Knowledge:

- Paper and pencil tests - Participants respond to a printed set of questions. The test may consist of multiple-choice, true-false, matching, and/or sentence-completion items.
- Essays - Participants respond in writing to one or more questions or problem situations. They may be asked to compare, discuss, analyze, evaluate, or the like.
- Oral tests - Participants respond to a set of questions orally, usually on an individual basis.
- Oral presentations - Participants give a formal oral presentation to a selected group on a specific topic area.

9.11.2 Enhancement of Thinking Skills

- Case Studies - Participants analyze and give alternative solutions to an event, incident, or situation that is problematic. This may be done in written or oral form and be either a group or individual exercise.
- Essays - Participants respond in writing to one or more questions or problem situations. They may be asked to demonstrate their ability to analyze, compare and contrast, criticize, or evaluate.
- Interviews - Participants conduct individual and/or group interviews. The focus of the exercise is to demonstrate their ability to analyze, criticize, or evaluate a specific problem or situation.

9.11.3 Development of Psychomotor Skills

- Performance tests - Participants perform a skill, operation, or practical application. Specified equipment and/or materials are often used. A clear statement of the standards required must be developed, and all parties must understand those standards.
- On-the-job observations - Participants, under the eye of the evaluator, carry out a set of performance behaviors on the job. Clear standards for performance must be set.
- Product reviews - Participants produce a product for review by the instructor and/or outside expert or panel of experts.

9.11.4 Changes in Attitudes

- Role playing - Participants role-play a situation, focusing on attitudes and feelings.
- Paper and pencil tests - Participants answer a printed set of questions that focus on specific attitudes. Although these tests are difficult to construct, they can provide a very useful measure.
- Exercises - Participants take part in exercises that display their attitudes about a particular topic or situation.

9.12 Evaluation to Assist Learning

The following seven indicators can help instructors judge whether their evaluation processes are useful and significant to learners as they engage in the learning process:

- Clarity - Describing clearly the criteria for what is expected of learners (e.g. in class participation, written assignments) and specific action they can make to enhance their learning efforts.
- Immediacy - Giving feedback as soon as possible after the activity has been completed.
- Accessibility - Providing opportunities for learners to participate in discussions about their evaluation.
- Affirmation - Acknowledging participants' efforts and achievements, no matter how large or small.
- Future orientation - Giving clear suggestions for future changes and actions.
- Justifiability - Making sure that learners understand how the evaluation will help them in their learning efforts.

Of the seven the indicators listed above, affirmation and future-orientation are the most challenging and helpful to both instructors and participants.

9.13 Instructional Plans

When clearly and concisely developed, instructional plans provide roadmaps that help instructors get where they want to go and remind them of their intended route. Three major advantages of preparing these plans are that they help the instructor (1) stay within the time frame for various parts of the educational activity; (2) know whether they have wandered too far off the topic; and (3) complete the learning activity in the allotted time. There is no set form for an instructional plan as long as these main components of the activity are outlined:

- Learning objectives
- Content areas and key points to emphasize
- Techniques and materials to be used
- Evaluation plan
- Estimated time for each major part of the learning activity or activities

9.13.1 Making the Instructional Plan

The instructional plan should be used as a guide for how the instructor and the participants spend their time in the session, not as a document that dictates precisely what each person must do when. There must be room for flexibility and change in both the content and the learning process, depending on the learners and what happens in the learning situation.

How instructors, whether they are leaders of individual sessions or special speakers, put their instructional plans into action can either foster or block a positive climate for learning. Instructors can enhance learning by sharing their content mastery, being helpful facilitators, and using instructional techniques and evaluation strategies appropriate and establishing good rapport with the participants. All these actions assume that instructors have some level of knowledge about the participants and come to the learning event well prepared.

Motivating participants up front is a very important part of making the instructional plan work. An effective way to capture participants' interest is to get them personally involved with the material. This could be done in smaller groups, by starting with a question-and-answer period or breaking the group into dyads or small work teams. In larger groups, presenters could use human-interest stories or prepare participants by highlighting two or three new and exciting ideas at the outset. However participation and interest are fostered, the method should be well throughout and applicable to the program content.

A second way to motivate the group is by having enthusiastic and energetic instructors. Instructors who are open to questions and comments, use humor, and interact in an active manner can spark the interest of even the more reluctant participants.

Some helpful hints for instructors as they move through the instruction plan are listed below:

- Remove or lessen anxieties of the participants.
- Spell out clearly and up front the expectations for participants.
- Set or develop group norms. (Let participants know that active participation is encouraged, divergent opinions are welcomed, and a question and answer period will be a part of the presentation.)
- Share what you have in common with the participants.
- Let learners know you are there to help them learn.
- Use nondiscriminatory language that all participants can readily understand and treat participants in an unbiased way.
- Give participants advanced organizers to help them follow the ideas presented.
- Use the resources and expertise of the participants.
- Use an outline or notes rather than reading a formally prepared paper or script.
- Restate ideas.
- Be generous with examples.
- Listen carefully to all ideas presented by the participants and respond appropriately.
- Keep a good pace and be aware of time.
- Provide feedback and positive reinforcement to participants throughout the session.
- Recognize that emotions play a part in the learning process.
- Be flexible with your presentations, instructional plans and techniques.
- Be caring and openly committed to the participants' learning.

TASK TEN

Coordinating Facilities and On-Site Events

10.1 Objectives

- Obtain suitable facilities that will provide a good environment for learning and arrange for instructional equipment that works.
- Oversee all of the on-site program arrangements (for example, those dealing with facilities, instructors and other staff, equipment, program schedule).
- Create a positive climate for learning from the moment the participants arrive.
- Provide a system for monitoring the program and making sound (but quick) decisions when program changes are needed.
- Gather data for the program evaluation and provide incentives, when needed for completing the evaluation process.
- Give recognition to program participants (for example, certificates) and thank both staff and participants for being part of the program.
- Tie up all loose ends after the program is completed (such as storing equipment, completing administrative forms, and conducting staff debriefings).

10.2 Obtaining Suitable Facilities

The environment in which educational activities take place affects participants' learning. A learning environment is defined as every space in a facility in which meeting activities occur and the degree to which each detail of those spaces can be designed to contribute to higher levels of learning. Typically the most important space for all educational programs is the meeting rooms, whether they are designed for group or individual learning.

There are five facilities most often used for educational activities:

- In-house organizational facilities
- Hotel facilities
- Conference centers
- College and university facilities
- Resort areas

Each type of facility has its advantages and disadvantages, depending of the objectives of the educational activity, the instructional techniques used, the participants, the leaders, the cost, accessibility, and the type of services provided by the facility.

10.2.1 Choosing Meeting Rooms

Different learning activities require different types of meeting rooms from large auditoriums to small seminar rooms and seating arrangements. For example, instructors who want to foster group interaction and team building should not choose a huge room and arrange chairs in rows, preventing participants from facing each other. Rather they should place chairs around a table or in a circle in a small room; that arrangement provides a much better learning environment for these kinds of activities

10.2.2 Opening the Program

It is crucial to create a positive climate for learning at the opening of any event. Climate-setting starts as soon as the participants arrive. The way participants are orientated to the actual learning activities at the start is also very important. Items usually included in the orientation process are staff and participant introductions; an explanation of the objectives of the program; clarification of program requirements (attendance, outside assignments, instructor and participant expectations); and basic administrative information (start and finish times). This orientation can be done formally (e.g. in a session whose sole purpose is orienting participants) or informally (e.g. at the opening of the program and/or in individual program sessions).

The size of the group and the format for learning are two factors that determine how the orientation process should be conducted. For small and midsize groups, the orientation is usually done with the whole group, whether as a separate session or as a part of opening the program. In most situations, the staff are introduced to the group first. If the group is small (fifteen or fewer), program participants should also be introduced to the whole group. If the number is greater than fifteen, the coordinator or instructor may choose to divide the group into smaller groups or into triads or dyads for the initial introductions. Although grouping does not allow the learners to get a snapshot of all the other participants, it does give them the opportunity to become acquainted with at least one or more other students. This type of activity is especially important when the learners do not know each other.

The learning format also plays a part in determining what the orientation process should be like and even what the content should be addressed. If the learning format calls for active involvement of the participants, then this should be demonstrated or discussed.

10.2.3 Monitoring the Program

Experienced program planners know that things can go wrong while the program is in process. No matter what the source of the problem, the key is to find solutions that allow the program to keep functioning at an optimal level. This means program coordinators must continually monitor the program and remain flexible.

Even if the program appears to be running smoothly, it is important that program coordinators continue to monitor all activities. This includes checking to see that all presenters and other staff are present and prepared; rooms continue to be arranged as requested; and participant concerns and problems are addressed in a timely manner.

An effective way to monitor the program is to have participants give evaluation feedback to program staff at designated times during the event. This type of feedback is especially useful for programs of more than one day, when changes in the program's format or content could be made. *The most critical component of the monitoring processes using feedback to make program adjustments as needed.*

10.3 Closing the Program

In closing the program, program coordinators need to accomplish three tasks. The first task is to ensure that all data needed for the evaluation have been collected. Depending on the evaluation design, the data collection may have been done throughout the program, at the end of the program, or both. Especially when participants are asked to give written evaluative comments, it is helpful to offer some kind of incentive for completion.

A second task is to give participants recognition for taking part in the program. One common practice for giving formal recognition is to award certificates to all participants who have successfully met certain reestablished minimum requirements.

The third task at the end of a program is to thank both participants and staff or being a part of the program. This can be done either at a group session or individually, depending on the learning format.

TASK ELEVEN

Communicating the Value of the Program

11.1 Objectives:

- Prepare a program "report" (for example, a journalistic-style report, media presentation, and poster) that addresses well the function, scope, and audience for the program.
- Ensure that the report is done in a format that will reach appropriate individuals, groups, organizations, and/or the general public.
- Be proactive in how you time the release of the report.
- Follow up as needed with appropriate individuals and groups to clarify any questions or concerns about the program.

11.2 Preparing Reports on Educational Programs

Five factors are important to consider when preparing reports on educational programs: function, scope, audience, content, and format.

Function—Reports on educational programs may fill one or more major functions. A report can be used to educate and gain support from key people and groups, to facilitate and inform decision making about current and future programs, to provide accountability and/or to market the educational program. The people responsible for preparing the report must have a clear understanding of how the report will be used before constructing it.

Scope and audience—Decisions must also be made about the scope and audience for the report. How comprehensive should the report be? Will it describe only a specific educational event, selected parts or a program, or the educational program as a whole? Who should receive the report? There may be one or multiple audiences, depending on the function and scope of the communication. Common audiences for reports on educational programs include the following:

- Past, current, and future participants
- Instructors
- Supervisors of participants
- Senior management/administrators
- Members of advisory committees or planning committees
- Regulatory or licensing groups
- Funding agencies
- Professional groups or organizations

Content—The content of a report should be tailored to the issues and concerns of its recipients. A typical outline follows:

I. Introduction

- a. Purpose of the report
- b. How the information of the report was obtained
- c. What will be addressed in the report

II. Body of the Report

- a. Overview of the goals and/or objectives of the educational program or event
- b. Description of the program participants and activities
- c. Description of the results of the program or event
- d. Listing of conclusions and recommendations for future actions

III. Appendixes

Format – The format or the means by which the information is to be communicated to the appropriate audiences, can be handled in a number of ways:

- Formal written report -A detailed written description of program objectives, results, and recommendations. The depth and scope of the report depends on the purpose and audience for the document.
- Executive summary of formal written report - A one- or two- page summary of a formal written report highlighting the major components of that report. A summary may be found at the beginning of the complete report or be distributed separately.
- Case study report - A report that describes a specific educational event or situation. The case is used to illustrate a major face of the program.
- Product display - An exhibit of products produced as a result of an educational program. This is usually used in combination with a second format, such as a written report or an informational brochure.
- Poster or display board - A sign illustrating the results of an educational program. It can be used as part of an oral presentation or placed in a strategic place in the organization, visible to key personnel.
- Oral report - A formal or informal oral presentation highlighting specific aspects of an educational program. Although this type of report can be planned, it is often given on a spontaneous basis at staff or committee meetings.

- Informational brochure - A written document describing the program or series of programs and highlighting the results. It can be mailed, placed in display racks, or handed out in organizational meetings or at future programs.
- Electronic mail – A text or graphics about a program entered into an electronic mail system. This is especially useful when key audiences are primary users of this form of communication.

Although a report may use a single format, a combination of formats may be more effective. For example, although a formal written report with an executive summary may be developed, in presenting the report program planners may wish to use PowerPoint and display boards to illustrate important content of the document.